

EXHIBIT E**ARMS Web 3.0****Functional Design Specification****5 Extend Rental****Version 1.1****Extend Rental**

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1. Extend Rental Use Case**1.1 Application Overview**

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The following is a document used to illustrate the process for how the USER will extend a previously authorized rental using ARMS/Web 3.0. The intent for this release of the ARMS/Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

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1.2 Brief Description

This use case will describe how the USER will extend a previously authorized rental. The rental company (via an Authorization Request), the RENTAL ADMINISTRATOR (via a Customer Search), or Reporting (via the Callback feature) can initiate this use case.

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1.3 Use Case Actors

The following actors will interact with this use case:

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- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to extend a previously authorized rental. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the USER would represent, which include corporate account holders, car dealerships, insurance companies, and others.

- **ARMS** – The ARMS system will receive/send transactions to ARMS/Web to confirm the extended rental.
- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

1.4 Pre-Conditions

- The USER must have logged into the ARMS/Web system.
- The USER must have selected a previously authorized, open rental.

1.5 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to “Extend Rental”.

1.5.1 Activity Diagram – see Figure 92.

1.5.2 Basic Flow

1. The system will display the details of the Rental.
2. The USER will enter the number of days to extend the rental.
3. The USER will submit the Extended Rental Details.
4. The system will validate the number of days the rental will be extended.
5. The system will update the ARMS/Web database with the Extend Rental Details.
6. The system will read the profile for the confirmation screen setting.
7. For non-Enterprise rentals, the extension is sent to the non-ERAC rental car company’s rental system.
8. This ends the use case.

1.5.3 Alternative Flows

1.5.3.1 View Rental Notebook

At step 1 of the basic flow, the USER may choose to view the history of a rental. The USER will be able to see the diary notes associated with the Reservation / Rental.

5 *1.5.3.2 Display Confirmation*

After step 7, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional; therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

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1.5.3.3 Update USER Profile

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

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1.5.3.4 Validate Changes

If the USER changes or adds information, which does not pass validation, an error message will notify the USER and return them to step 1 of the Basic Flow.

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If an error is discovered in the validation of the reservation / rental information submitted by the USER, the system would present the USER with an error message and return them to the Detailed Reservation / Rental Display. If the error is specific to a data field within the form, the field should be highlighted and the error described.

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30 *1.5.3.5 Change Customer File*

Prior to step 3, the USER has the option to make changes to the customer file. After clicking the change/add link, the screen will

refresh with all editable fields opened and available for the USER to make changes.

1.5.3.6 Update ARMS/Web Database

5 After successfully validating the recent changes, the system must update the ARMS/Web Database. The system goes through the same process as in the Basic Flow, as the database is updated to reflect the latest changes.

10 1.6 Post-Conditions

- If the use case was successful then the rental has been extended and the ARMS/Web system has been notified.
- If the use case was unsuccessful then the system has remained unchanged.

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1.7 Special Requirements

- The number of days to extend a rental must be an integer greater than zero.
- If a USER attempts to extend an insured rental beyond their limits for number of days and dollar amount, the system should return an error message.

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1.8 Extension Points

25 1.8.1 MA-16 Reassign USER/Office (Transfer)

After the extend rental detail is displayed, the USER may choose to transfer the current office/USER. First, the USER would select to change the current office/USER. Second, the system would display a list of authorized offices/USERS. Third, the USER would select a new office/USER. If additional changes are made to the customer file, the new data will also be passed through the transfer process.

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1.8.2 MA-08 View Car Class

5 The View Car Class use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will include the average number of passengers and luggage items that can be served by a vehicle in the specific car class. The car class selected by the USER should be applied to the reservation.

1.8.3 MA-15 Terminate Rental

10 After the extend rental detail is displayed, the USER may choose to terminate the rental. If termination is selected, the USER must enter a reason for the termination of the rental. Termination means the insurance company is no longer willing to pay for the rental.

1.8.4 MA-04 Send Message

15 The Send Message will be used to allow the USER to capture messages and diary notes associated with extending a rental. The USER can elect to either have the message sent to the rental company responsible for the reservation/authorization, or (Depending on the user segment if this option is available) to store the note in the ARMS/Web system without
20 sending the message to rental company. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

2. **Screen Design**

25 A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 **Extend Rental Detail**

30 This screen (see Figures 93(a)-(e)) will allow the USER to pick which functions that he/she may want to change.

2.1.1 *Screen Layout - Extend Rental Detail* - see Figures 93(a)-(e)

2.1.3 *Extend Rental Detail*

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Additional Charges	Output	15	Additional Charges		
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Last Name + First Name
Note to Self Only	Input	50	Message	NOTE	
Messages:	Output	8	Message Creation Date	Add Date	N/A.
Note to Enterprise:	Input	50	Message Text	NOTE	N/A.
	Output	50	Message Text	NOTE	N/A.
Claim Number: Purchase Order Number Corporate Class Number	Output	11	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	
Days Authorized to Date:	Output	2	Number of Days Authorized	Number of Days Authorized	N/A.
___ additional authorized days	Output	2	Number of Days to Extend	Number of Days to Extend	
Policy Limits	List Box	5	Policy Maximum and Dollars per day	Max \$ Covered + Dollars Per Day Covered	
	Output	30	Rental Location Branch Name	Rental Location	
days @:	List Box	6	Rental Location Rate	Vehicle Rate	N/A.
Date of Rental	Output	10	Rental Start Date	Start Date	N/A.
Insured Name:	Output	30	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	Output	10	Date of Loss	Date of Loss	
	Output	20	Renter City Name	City	
	Output	10	Rental Postal / Zip Code	Zip Code	
	Output	3	Renter State / Province Code	State	
	Output	30	Renter Street Address	Address Line	
Home:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	Not editable if ticket is Open.
	Output	30	Renter's Name	First Name + Last Name	Will not be editable if ticket is open. First Name + Last Name
Renter Information:	Output	30	Renter's Name	First Name + Last Name	N/A.
Work Phone:	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	Will not be able to edit if ticket is Open.
Owner's vehicle:	Output	4	Vehicle Year, Make and Model	Renter Make/Model + Renter Vehicle Year	
Repair Facility:	Output	20	Body Shop Name	Repair Facility Name	
	Input	16	Body Shop Phone Number	Telephone Number	
	Output	15	Repair Facility City	City	
	Output	3	Repair Facility State	State	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
	Output	7	Repair Facility zip code	Zip Code	
Last Day authorized	Output	10	Date rental is authorized through	CALCULATED	Calculated field. Populated with an Open Ticket only.
Charges to Date:	Output	10	Total Charges	CALCULATED	
Renter Type	Output	10	Claim type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Vehicle Condition	Output	15	Type of Loss	loss type description	
Renter Email:	Output	20	Renter's Email	renter email	Will not be able to edit if ticket is Open.

2.1.4 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.4.1 Skip

When clicked, the USER will be taken out of the use case without changing the current status of the request. Any changes made by clicking Change or Add and keying data in the bottom section will be saved.

2.1.4.2 Process

When clicked, the system will validate the input and accept the changes made to the customer file. The ARMS/Web database will be updated. The use case will then end and the USER will return to the process from which they came.

2.1.4.3 *Notebook*

When clicked, the USER will be taken to the Note Book section at the bottom of the screen to view all messages for this rental.

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2.1.4.4 *Set Last Date*

When clicked, the system will terminate the rental. The USER will be prompted to enter a termination date for this rental. This coincides with the use case MA-17-Terminate Rental.

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2.1.4.5 *Transfer File*

When clicked, the USER will be taken to the Transfer File screen. This screen allows the USER to change the office or adjuster currently assigned to the customer file. The required information in the Extend Rental/Customer File will be passed to the Transfer File screen. Upon completion of the transfer, the USER will then be returned to the next action item or the profiled start page, depending on the screen from which the USER began.

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2.1.4.6 *Change or Add*

When clicked, the system will refresh the current screen and make all editable fields in the bottom section (outside the gray box area) input capable. The changes on the top of the screen will not be lost.

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2.1.4.7 *Top of page*

When clicked, the USER will be taken to the top of the current page.

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2.1.4.8 *View Car Class*

When clicked, the USER will be taken to the View Car Class Use Case. No changes will be lost. Once the USER is finished with this use case, the USER will return to the Extend Rental Use Case.

30

2.1.4.9 *Extend Rental*

When clicked, the system will validate the input and accept the extension AND the changes made to the customer file. The ARMS/Web database will be updated. The use case will then end and the USER will return to the process from which they came.

ARMS Web 3.0

Functional Design Specification

Review List - Action Items

Version 1.1

Review List - Action Items

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1. Review List Action Items Use Case

1.1 Application Overview

The following is a document used to illustrate the process for how the USER would view and/or select any outstanding action items assigned to them using ARMS/Web 3.0. The intent for this release of the ARMS/Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

1.2 Brief Description

This use case describes how the USER would view and/or select any outstanding action items assigned to them.

1.3 Use Case Actors

The following actors will interact with this use case.

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to review outstanding action items to be completed. This use

case refers to a USER in the role of a USER. There are various types of customers that the USER would represent, which include corporate account holders, car dealerships, insurance companies, and others.

- **ARMS** – The ARMS system will receive/send transactions to ARMS/Web based on actions of the USER, retrieving and acting action items.
- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

10 1.4 **Pre-Conditions**

- The USER must be logged into the ARMS/Web system.
- The USER must have selected to Review a List of Action Items.
- The system must retrieve and confirm the USER ID and access authority.

15 1.5 **Flow of Events**

The Flow of Events will include the necessary steps for a USER to review and assign outstanding action items.

1.5.1 *Activity Diagram* – see Figure 94.

1.5.2 *Basic Flow*

1. The USER selects to review the outstanding action items list.
2. The system retrieves the list of outstanding action items associated with the USER ID.
3. The system sorts and builds the list based on the appropriate USER profile.
4. The system will display a list of all outstanding action items assigned to the USER, which could include:
 - Authorize a Request
 - Extend a Rental
 - Handle Unapproved Invoices/Pay Approved Invoices
 - Send a Message

5. The USER will select an item from the action items list.
6. The system displays the detail appropriate to the action item status.
7. Upon completion of the selected action item, the system will determine the next action item and display until the current list has been completed.
8. This ends the use case.

1.5.3 *Alternative Flows*

1.5.3.1 *Handle For A Different USER*

Until step 5, the USER may choose to handle requests for another USER. At this time, the USER must select the appropriate USER to handle for. The system will then validate the ID of the alternate USER, and then rebuild the action list to include all outstanding items associated with the new ID.

1.5.3.2 *Re-sort Action Items List*

After displaying the action item list using the default from the profile, the USER may decide to sort the list based on some other criteria. At any time, the USER may choose to re-sort the action item list (Depending on the USER segment) based on Item Type, Date Received, Renter's Name, Claim Number or Corporate Class Number or Purchase Order Number, Rental Company, and Administrator.

1.5.3.3 *No Items Found*

If there are no Action Items available for the USER work on, the system will display a message indicating that there are no available action items to display.

1.6 **Post-Conditions**

None

1.7 Special Requirements

1.7.1 Sort Request

5 The default sort order has been specified by the USER's profile, which governs the order in which action items have been presented. If invoices have been added to the USER's payment list, a link displays for them to proceed to the 'Payment List'. Alternatively, after the last invoice has been approved, the system automatically proceeds to the 'Payment List' before resuming the outstanding action items. If the USER has been designated with the responsibility of handling the 'Unassigned Requests,' 10 a link at the bottom of the action item list displays.

1.8 Extension Points

15 An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.8.1 MA-12-Extend Rental

20 At step 5, the USER must select an action item to perform. At this point, the USER may elect to extend a previously authorized rental. Extensions may be performed due to prolonged body shop delays and other scenarios. Upon completion of the Extend Rental process, the USER should be returned to step 5 of the Basic Flow. The action item that called for the extension should no longer appear in the USER's action 25 item list.

1.8.2 MA-10-Authorize Request

30 At step 5, the USER must select an action item to perform. At this point, the USER may elect to authorize a direct bill request. Upon completion of the authorization, the USER should be returned back to step 5 of the Basic Flow. The request needing authorization should no longer appear in the USER's action item list.

1.8.3 *Invoicing – BI-01-Handle Unapproved Invoices & BI-02 Pay Approved Invoices & BI-03 Reject an Invoice*

At step 5, the USER must select an action item to perform. At this point, the USER may elect to pay approved invoices, handle unapproved invoices, or reject an invoice. Upon completion of this process, the USER should be returned back to step 5 of the Basic Flow. The invoices that were processed should no longer appear in the USER's action item list.

1.8.4 *MA-19 – View Customer File (Message)*

At step 5, the USER must select an action item to perform. At this point, the USER may elect to view a message from the rental company. Upon completion of the message, the USER should be returned back to step 5 of the Basic Flow. The message should no longer appear in the USER's action item list.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Action Items

This screen (see Figures 95(a)-(e)) will allow the USER to pick which functions that he/she may want to change.

2.1.1 Screen Layout – Action Items - see Figures 95(a)-(e)

2.1.2 Action Items – Summary

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Date Received	Output	0	Date Received	action item assigned date	N/A.
Type	Output	15	Action Item Type	action item type description	N/A.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
USER	Output	0	USER's Name	First Name + Last Name	N/A.
Handling For:	List Box	30	Handling for USER's Name	First Name + Last Name	N/A.
Welcome Back	Output	30	User's Name	First Name + Last Name	N/A.
Claim Number Purchase Order Number Corporate Class Number	Output	0	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	N/A.
Renter's Name	Output	30	Renter's Name	First Name + Last Name	N/A.
Claims Office:	List B ox	3	Office	external organization abbreviated name	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Renter's Name

When clicked on a specific hyperlink under the "Renter's Name" heading, the USER will go into the details of that particular action item and will begin any of the following use cases:

- MA-12-Extend Rental
- MA-10-Authorize Request
- Invoicing – BI-01-Handle Unapproved Invoices & BI-02-Pay Approved Invoices & BI-03 Reject an Invoice
- MA-19-Customer File (Message)

ARMS Web 3.0
Functional Design Specification
Assign a Request

5 **Version 1.1**

Assign a Request

10 **1. Assign a Request Use Case**

1.1 Application Overview

The following is a document used to illustrate the process for assigning the unassigned authorization requests to the appropriate user. The assignments will be made using the ARMS Web 3.0 system. The intent for this release of the ARMS Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

1.2 Brief Description

This use case describes the process of how a USER will review unassigned authorization request and assign them to a USER for further handling.

1.3 Use Case Actors

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – RENTAL ADMINISTRATOR will use the system to assign the unassigned authorization requests. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the rental administrator would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **ARMS** – The ARMS system will receive/send transactions to ARMS Web to manage each phase of the rental process.

- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

5 1.4 **Pre-Conditions**

- The USER must be signed-on to the ARMS Web system.
- The USER should be authorized to assign a request.
- If there are unassigned requests present, the USER has selected the link from the Review List Action Items Use Case to enter this use case.

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1.5 **Flow of Events**

The Flow of Events will include the necessary steps to make changes and updates to “Assign an Action Item”.

15 1.5.1 Activity Diagram – see Figure 96.

1.5.2 Basic Flow

1. The USER selects the unassigned authorizations link.
2. The system retrieves all unassigned request summaries.
- 20 3. The system retrieves all OFFICE IDs within ARMS Web.
4. The system retrieves all USER IDs within the OFFICE.
5. The system displays the unassigned authorization summaries with the offices and users.
6. The USER selects a user to assign to the request.
- 25 7. The system will update the ARMS Web database.
8. This ends the use case.

1.5.3 Alternative Flows

30 1.5.3.1 *Cancel Use Case*

The USER should be capable of leaving the use case at any point prior to assigning the of the reservation information.

1.5.3.2 *Modify a Request*

Before step 6 of the basic flow, the USER should be able to make changes to the authorization.

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1.5.3.3 *Select a different office*

Before step 6 of the basic flow, the USER should be able to select a different office for this authorization request. If a different office has been selected, the user cannot assign the file to a new user.

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The new office must now assign the file.

1.6 **Post-Conditions**

If the use case is successful, the system will change the request type from an unassigned authorization request to direct bill. If the user has authority to authorize this request, the system will change the request to Authorized status and assign the adjuster picked in Step 5 of the basic flow.

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If the use case is unsuccessful, the system state will remain unchanged.

20 1.7 **Special Requirements**

None

1.8 **Extension Points**

25 1.8.1 MA-04 Send Message

The Send Message function will be used to allow the user to capture messages and diary notes associated with a rental reservation/authorization. The USER can elect to have the message sent to the rental branch location responsible for the reservation/authorization.

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The USER may also send a message without assigning the file to a user/office. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

1.8.2 MA-10 Authorize a Request

The USER may decide to enter into the full detail screen of the unassigned request, which would invoke the Authorize a Request use case.

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2. **Screen Design**

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

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2.1 **Action Items - Unassigned**

This screen (see Figures 97(a)-(e)) will allow the USER to assign action items to an office or USER. The USER may also cancel an item or change specified information in the Customer File through this screen.

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2.1.1 Screen Layout - Action Items - Unassigned (ARMS Web 2.0) - see Figures 97(a)-(e)

2.1.2 Action Items - Unassigned

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	N/A.
	Output	30	Renter's Name	First Name + Last Name	This should be a link. The USER should be able to get to the authorize page from this screen field
	Output	30	Renter's Address	Address Line	
	Output	10	Renter's City	City	
	Output	3	Renter's State	State	
	Output	10	Renter's Zip Code	Zip Code	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	If these fields are populated, add a label to the screen to differentiate between Home Phone and Work Phone
	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	If these fields are populated, add a label to the screen to differentiate between Home Phone and Work Phone
Claim Number Purchase Order Number Corporate Class Number	Input	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	N/A.
Vehicle Condition	List Box	15	Loss Type	loss type description	
Claim Type Bill Type	List Box	15	Claim Type Bill Type	Rental type description	N/A.
Date of Loss:	Input	10	Date of Loss	Date of Loss	N/A.
Note to Enterprise	Input	30	Message Text	NOTE	N/A.
Assign to office:	List Box	5	Office Id	external organization abbreviated name	
Assign adjuster:	List Box	30	Adjuster Name	First Name + Last Name	Lists only those adjusters the USER has authority to assign

Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.2.1 <<Previous

When clicked, the USER will be taken back to the previous screen.

5

2.1.2.2 Process

When clicked, the USER will be taken to the next item in the action item list or a detail of the completed action items. This button ends the use case.

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2.1.2.3 Cancel

When clicked, the USER will be allowed to cancel the authorization. If this occurs, the rental becomes unauthorized and the rental is no longer responsibility of the company.

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ARMS/Web 3.0

Functional Design Specification

View Car Class

20 **Version 1.3**

View Car Class

1. View Car Class Use Case

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1.1 Application Overview

The following is a document used to illustrate the process for how the USER would view examples of automobiles that are part of each rental company car class using ARMS/Web 3.0. The intent for this release of the ARMS/Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

30

1.2 Brief Description

This use case will allow the USER to view examples of automobiles that are part of each rental company car class. The USER will have the ability to select a car class and have the rate for the car class apply to the reservation/authorization.

5 1.3 **Use Case Actors**

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to view and/or select the car class that will apply to a reservation. This use case refers to a USER in the role of a USER.
10 There are various types of customers that the USER would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **ARMS** – The ARMS system will receive/send transactions to ARMS/Web to retrieving information regarding the automobiles.
- 15 • **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

1.4 **Pre-Conditions**

- 20 • The USER must be signed-on to the ARMS/Web system.
- The USER must have a reservation or open ticket selected.

1.5 **Flow of Events**

25 The Flow of Events will include the necessary steps to view and/or select the car class to apply to a rental reservation.

1.5.1 *Activity Diagram* – see Figure 98.

1.5.2 *Basic Flow*

30 The **Basic Flow** of the View Car Class use case includes all of the required steps to view and/or select a car class for a rental reservation. If a car class is selected, it will be used to populate rate information on a rental authorization.

1. The USER will select View Car Class from the active reservation or open ticket.
2. The system will display a car class detail screen. If the USER had previously selected a car class (for example, on the Create Reservation screen), the car class selected will be displayed. If no car class has been selected, the system will display the Standard car class.
3. The USER will select the car class to apply to the reservation or open ticket.
4. The system will return the USER to the active reservation or open ticket and populate car class information based on the car class selected.
5. This ends this use case.

1.5.3 *Alternative Flows*

1.5.3.1 *Select Alternate Car Class*

From Step 2 of the **Basic Flow**, the USER will have the ability to view an alternate car class. The car classes that will be available to view include:

- Economy
- Compact
- Intermediate
- Standard
- Full Size
- Premium

If the USER selects an alternate car class, the system will refresh and present the details of the new car class.

1.5.3.2 *Populate Car Class Rates*

If a rental branch location has already been selected prior to entering this use case, the selection of a car class will populate the rates that apply to the selected car class on the active

reservation or open ticket. This alternate flow returns the USER to Step 4 of the **Basic Flow**.

1.6 Post-Conditions

- 5
- If successful, the selected Car Class will be returned to the active reservation or open ticket.
 - If unsuccessful, the system state is unchanged.

1.7 Special Requirements

10 The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.7.1 *Modify Car Class Selection Results*

15 The USER may change the results of this use case as part of the active reservation or open ticket.

1.8 Extension Points

None.

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2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

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2.1 Car Class Detail Screen

This screen (see Figures 99(a)-(b)) will allow the USER to view detailed information about the rental company's car classes. The USER will also have the ability to select a car class to apply to a rental reservation / authorization.

30

2.1.1 *Screen Layout* - see Figures 99(a)-(b)

2.1.2 Car Class Details

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
	Output	20	Car Class Name		This should be the name of the currently selected car class.
	Output	40	Rental Company Name		
(Person Image)	Output	2	Car Class Person Capacity		This should provide the average person capacity of the selected car class.
(Luggage Image)	Output	2	Car Class Luggage Capacity		This should provide the average luggage capacity of the selected car class.
	Hidden	255	Car Class Image Source		This should provide a picture of an example car within the selected car class.
	Output	120	Car Class Detail Description		This should provide a description of the selected car class.
Economy	Output		Economy Car Class		This should be a hyperlink to the Economy car class detail.
Compact	Output		Compact Car Class		This should be a hyperlink to the Compact car class detail.
Intermediate	Output		Intermediate Car Class		This should be a hyperlink to the Intermediate car class detail.
Standard	Output		Standard Car Class		This should be a hyperlink to the Standard car class detail.
Full Size	Output		Full Size Car Class		This should be a hyperlink to the Full Size car class detail.
Premium	Output		Premium Car Class		This should be a hyperlink to the Premium car class detail.

2.1.3 *Screen Function Definition*

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

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2.1.3.1 *Select This Car Class*

The **continue** screen function will allow the USER to select the car class to apply to a reservation.

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2.1.3.1.1 The **Continue** screen function is invoked through either a button click or through an **Enter** keystroke.

2.1.3.2 *Previous*

The **Previous** screen function allows the USER to return to the previous screen.

15

2.1.3.2.1 The **Previous** screen function is invoked through a button click.

20 3. **Questions and Answers**

None.

ARMS/Web 3.0

Functional Design Specification

25 **Authorize a Request**

Version 1.1

Authorize a Request

30

1. Authorize Request Use Case

1.1 Application Overview

The following is a document used to illustrate the process for how a USER authorizes a direct bill request using ARMS/Web 3.0. The intent for this release of the ARMS/Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

1.2 Brief Description

This use case describes how a USER authorizes a direct bill request.

1.3 Use Case Actors

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to authorize a direct bill request. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the USER would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **ARMS** – The ARMS system will receive/send transactions to ARMS/Web to confirm the direct bill request.
- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

1.4 Pre-Conditions

- The USER must be logged into the ARMS/Web system.
- The USER must have the authority to authorize a request.
- At least one outstanding unauthorized direct bill request must be assigned that the USER may handle.
- The USER must have selected an Unauthorized Direct Bill Request from the Review Action Items Screen or from the Search Results page.

1.5 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to “Authorize Request”.

1.5.1 Activity Diagram – see Figure 100.

5

1.5.2 Basic Flow

1. The USER selects an outstanding direct bill to authorize.
2. The system displays the Customer file.
3. The USER reviews the renter's information.
- 10 4. The USER inputs a number of Authorized Amounts, days and required fields.
5. The USER submits the Authorization.
6. The system validates information in the Customer File.
7. If the USER assigned to the Customer File is 'UNKNOWN' or
15 'UNASSIGNED', the System will assign the Customer File to the current USER.
8. The system will update the ARMS/Web database with the Authorization.
9. The System reads the USER profile to see if the confirmation
20 page should display.
10. If the profile indicates 'Show Confirmation Page', the System will display the confirmation page.
11. For non-Enterprise rentals, the authorization request is sent to the non-ERAC rental car company's rental system.
- 25 12. This ends the use case.

1.5.3 Alternative Flows

1.5.3.1 View Notebook

- 30 At step 3 of the Basic Flow, the USER can select to view the transaction history (Notebook) by selecting the Go To Notebook link.

1.5.3.2 *Add Notes to Customer File*

At step 3 of the Basic Flow, the USER can add notes to the Customer File by typing in the appropriate notes field on the Customer File page.

5

1.5.3.3 *Skip Customer File*

At step 3 of the Basic Flow, the USER can get out of the Customer File by selecting the skip button on the Customer File page.

10

1.5.3.4 *Change Customer File*

At step 3 of the Basic Flow, the USER can make changes to the additional details of the Customer File. This is done by selecting the Add / Change link which will invoke an editable page with all *appropriate information editable.

15

1.6 **Post-Conditions**

- If the use case was successful then the changes should go into effect immediately and the screen should revert back to the original screen of entry.
- If the use case was successful, then the ARMS/Web system will be notified of authorization changes.
- If the use case was unsuccessful then the system state will be unchanged.

20

25

1.7 **Special Requirements**

1.7.1 *Requirements for Claim Type Authorizations (Insurance Users Only)*

The following are a set of requirements surrounding the type of authorized amounts that are allowable based on the Claim Type associated with a rental. These restrictions **DO NOT APPLY** to

30

reservations that are submitted with a Direct Billing Percentage of zero (0).

1.7.1.1 When the Claim Type selected is 'Insured', 'Theft', or 'Uninsured Motorist'

1.7.1.1.1 For insurance USERS, the reservation/rental must always include an Authorized Rate or both Policy Daily **and** Maximum Limits as defined by the renter's insurance policy. Zero (0) is an acceptable Policy Daily Limit.

1.7.1.1.2 For insurance USERS, the reservation/rental must include an Authorized Rate or Policy Daily Limit if a Policy Maximum Limit is included. Zero (0) is an acceptable Policy Daily Limit.

1.7.1.2 When the Claim Type selected is 'Claimant' (Insurance Users Only)

1.7.1.2.1 The reservation/rental must always include an Authorized Rate.

1.7.1.2.2 The reservation/rental may not include a Policy Daily/Maximum Limits selection.

1.7.1.3 Requirements for editable fields based on reservation / ticket status

1.7.1.3.1 Depending on the status of the Customer File the USER may change the following fields:

Field Name (Depending on USER Segment)	Unassigned/ Unauthorized Reservation/ Ticket	Assigned but Unauthorized Reservation or Ticket	Authorized Ticket
CLAIM NUMBER (Insurance & Fleet) PURCHASE ORDER NUMBER (Dealership) CORPORATE CLASS NUMBER (Corporate)	X	X	X
CLAIM TYPE (Insurance) BILL TYPE (Dealership)	X	X	X
VEHICLE CONDITION	X	X	X
DATE OF LOSS (Removed for corporate)	X	X	X
INSURED INFORMATION	X	X	X
RENTER INFORMATION	X		
DATE RENTAL IS NEEDED	X		
NUMBER OF AUTHORIZED DAYS	X	X	
DIRECT BILL PERCENT (Insurance Only)	X	X	X
POLICY LIMITS (Insurance and Corporate Only)	X	X	X
AUTHORIZED RATE	X	X	X

If the Customer File is an Unauthorized Reservation, the USER can Reject the Authorization Request, Send a Message, and/or Transfer (Assign) the file to a USER.

5

1.7.1.3.2 If the status of the Customer File is an open ticket the following rules apply:

Actions	Authorized Reservation	Unauthorized Reservation / Ticket	Authorized Open Ticket
Send Message	X	X	X
Extension			X
Terminate Rental			X

Actions	Authorized Reservation	Unauthorized Reservation / Ticket	Authorized Open Ticket
Cancel Authorization	X	X	
Transfer/Assign Adjuster	X	X	X
View Car Class	X	X	X

1.8 Extension Points

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.8.1 MA-04 Send A Message

The Send Message will be used to allow the USER to capture messages and diary notes associated with extending a rental. The USER can elect to either have the message sent to the rental company responsible for the reservation/ authorization, or (Depending on the USER segment if this option is available) to store the note in the ARMS/Web system without sending the message to rental company. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

1.8.2 MA-07 Additional Charges

The USER may choose to select the additional charges button that displays a page showing all the additional items at the branch with the branch charges displayed. The USER can select the items and enter in the authorized amounts.

1.8.3 MA-16 Transfer Work

The USER may choose to transfer an authorization to a different USER in his/her office or transfer the authorization to another USER in a different office.

1.8.4 MA-08 View Car Class

The USER may choose to view the car class. This button invokes the View Car Class use case.

5 1.8.5 MA-17 Cancel Authorization

The USER may choose to deny the authorization. When the USER selects the CANCEL button, it will invoke the Cancel Authorization use case to reject the authorization.

10 2. **Screen Design**

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

15 2.1 **Authorize Rental Detail**

This screen (see Figures 101(a)-(e)) will allow the USER to work the currently selected authorization request. The USER (Depending on the USER segment) may set the authorization amounts and policy coverage limits or may assign the request to another USER.

20

2.1.1 *Screen Layout - Authorize Rental Detail - see Figures 101(a)-(e)*

2.1.2 *Authorize Rental Detail*

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Handling For:	List Box	30	Handling for USER's Name	First Name + Last Name	
Note to:	Input	0	Message	NOTE	
Notebook	Output	50	Message	NOTE	
	Output	8	Message Creation Date	Add Date	
Message	Output	50	Message Text	NOTE	
	Output	10	Notebook creation date	Add Date	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim no Corporate Class no Purchase Order no	Output	30	Claim Number Corporate Class Number Purchase Order Number	Insurance Claim Number	<ul style="list-style-type: none"> Claim number for an insurance USER Corporate Class number is for a corporate USER Purchase order number is for a dealership USER
- Claim Number: - Corporate Class Number - Purchase Order Number	Input	11	Claim Number Corporate Class Number Purchase Order Number	Insurance Claim Number	<ul style="list-style-type: none"> Claim number for an insurance USER Corporate Class number is for a corporate USER Purchase order number is for a dealership USER
___ days @	Input	4	Number of Days Authorized	Number Of Days Authorized	
Direct Bill %:	Input	6	Percent Covered	Bill To %	Only visible to insurance USER
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Dollars Per Day Covered	Only visible to insurance and fleet USERS.
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Max \$ Covered	Only visible to insurance and fleet USERS.
	Output	30	Rental Location Branch Name	Rental Location	
Date Rental Needed:	List Box	10	Rental Start Date	Start Date	
days @ ____	List Box	6	Vehicle Rate	Vehicle Rate	
Insured Name:	Input	30	Insured's Name	First Name + Last Name	
Insured Name:	Output	20	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	
	Output	25	Rental Location City Name	City	
	Output	10	Rental Location Postal / Zip Code	Zip Code	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	3	Rental Location State / Province Code	State	
	Output	13	Rental Location Telephone Number	Telephone Number	
Date of Loss:	List Box	10	Date of Loss	Date of Loss	Remove for corporate USERS
Date of Loss	Output	10	Date of Loss	Date of Loss	Remove for corporate USERS
	Output	30	Renter's Address Line	Address Line	
Renter's Address	Output	20	Renter's City	City	
	Output	3	Renter's State/Province Code	State	
	Output	15	Renter's Zip/Postal Code	Zip Code	
Home Phone:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	This field is input if the ticket is not opened. It will not be editable if the ticket is open.
Authorize Direct Bill: for	Output	30	Renter's Name	First Name + Last Name	N/A.
Renter:	Output	30	Renter's Name	First Name + Last Name	N/A.
	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	
Owner's Vehicle	Output	20	Vehicle Year, Make and Model	Renter Vehicle Year + Renter Make/Model	
	Output	15	Repair Facility City	City	
Repair Facility	Output	20	Repair Facility Name	Repair Facility Name	
	Output	3	Repair Facility State	State	
	Output	10	Repair Facility Telephone Number	Telephone Number	
	Output	7	Repair Facility Zip Code	Zip Code	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Type:	List Box	15	Claim Type	claim type description	N/A.
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Vehicle Condition	List Box	20	Loss Type	loss type description	
Vehicle Condition	Output	20	Type of Loss	loss type description	
	Input	20	Renter's Email	renter email	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Skip

When clicked, the USER will be taken out of the use case without changing the current status of the request. Any changes made by clicking Change or Add and keying data in the bottom section will be saved.

2.1.3.2 Process

When clicked, the system will validate the input and accept the changes made to the customer file. The ARMS/Web database will be updated. The use case will then end and the USER will return to the process from which they came.

2.1.3.3 Notebook

When clicked, the USER will be taken to the Note Book section at the bottom of the screen to view all messages for this rental.

2.1.3.4 Set Last Date

When clicked, the system will terminate the rental. The USER will be prompted to enter a termination date for this rental. This coincides with the use case MA-17-Terminate Rental.

5 *2.1.3.5 Transfer File*

When clicked, the USER will be taken to the Transfer File screen. This screen allows the USER to change the office or USER currently assigned to the customer file. The required information in the Extend Rental/Customer File will be passed to the Transfer File screen. Upon completion of the transfer, the USER will then be returned to the next action item or the profiled start page, depending on the screen from which the USER began.

10

2.1.3.6 Change or Add

When clicked, the system will refresh the current screen and make all editable fields in the bottom section (outside the gray box area) input capable. The changes on the top of the screen will not be lost.

15

20 *2.1.3.7 Top of page*

When clicked, the USER will be taken to the top of the current page.

2.1.3.8 View Car Class

When clicked, the USER will be taken to the View Car Class Use Case. No changes will be lost. Once the USER is finished with this use case, the USER will return to the Extend Rental Use Case.

25

ARMS Web 3.0
Functional Design Specification
Create Reservation

5 **Version 1.4**

Create Reservation

10 **1. Create Reservation Use Case**

1.1 Application Overview

The following is a document used to illustrate the process for creating a reservation using ARMS Web 3.0. The intent for this release of the ARMS Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

1.2 Brief Description

This use case will describe how a USER would create a rental reservation in the ARMS Web system. When creating a reservation, the USER is also creating an authorization for payment. The USER may also submit a reservation without authorizing payment.

1.3 Use Case Actors

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to create an authorized reservation. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the rental administrator would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **ARMS** – The ARMS system will receive/send transactions to ARMS Web to confirm the extended rental.

- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

5 1.4 **Pre-Conditions**

- The USER must be signed in to the ARMS Web system.
- The USER must the authority to create a reservation.

1.5 **Flow of Events**

10 The Flow of Events includes all steps necessary to create a reservation using the ARMS Web system.

1.5.1 *Activity Diagram* – see Figure 102.

15 1.5.2 *Basic Flow*

The **Basic** Flow of the Create Reservation use case includes all of the required steps for a new reservation to be created in the ARMS Web system. Shadowed boxes in the Activity Diagram indicate the **Basic Flow**.

- 20 1. The USER selects to create a reservation from the top navigation menu.
2. The system prompts the USER to enter initial information about the renter (Depending on the user segment):
- 25 • Corporate Class Number or Claim Number (The use case will refer to this as 'Reference Number')
- Bill type
- Renter First Name
- Renter Last Name
- Rental Company
- 30 • Telephone Number or Postal Code where the renter would like to be picked up
3. The USER enters initial information about the renter.

4. The USER submits the initial reservation information to the system.
5. The system will validate the initial information entered by the USER. (See section 1.5.3.1 Initial Reservation Information Invalid in **Alternative Flows** on page 4 for validation rules.)
6. The system will perform a search for previous authorizations that may correlate directly to the rental reservation that the USER is beginning to establish. The system will search for two key types of records:
 - **Unauthorized Request Matches**

An Unauthorized Request is defined as a rental Authorization Request that is generated when The Rental Company creates a reservation or contract for the customer that has not been approved. This search helps to prevent the USER from creating a new reservation for a customer that has an outstanding Unauthorized Request in the ARMS system. The Unauthorized Request search is completed using the first three characters of the *Renter Last Name* and is limited to unauthorized requests (requests in unassigned or direct bill request statuses) for the selected *Office*. If matches are found, the Unauthorized Request/ Authorized Request Search Matches **Alternative Flow** will be invoked.
 - **Authorized Matches**

Reference numbers that have already been associated with a rental reservation or contract (i.e., Authorized Rentals) should be brought to the attention of the USER to help prevent over-authorization situations. The system will search for an exact corporate class number match on any reservation or ticket (open or closed) related to the company in the last six months. This search will be completed using the exact *Reference Number* on all

authorized requests (requests in any status other than unassigned or direct bill request).

If no matching records are found, the **Basic Flow** continues.

- 5 7. The system will retrieve a rental branch location where the rental is needed based on the Telephone Number or Postal Code entered by the USER. If no allocation is found, a message should be generated notifying the USER that no location was available for the search criteria and that Claims Connection will handle the reservation (include the search criteria in message).
- 10 8. The system will retrieve the current applicable rates for that rental branch location. If no rental branch location is available, the system will display an open text box to allow the USER to type in a rate.
9. The system will display the Quick Reservations screen.
- 15 10. The USER will enter the reservation information.
11. The USER submits the reservation to the system.
12. The system will validate the reservation information submitted by the USER. (See section 1.5.3.3 Reservation Information Invalid in **Alternative Flows** on page 5 for validation rules.)
- 20 13. The system updates the database.
14. The system sends the reservation to ARMS.
15. The system will display the reservation confirmation to the USER. The reservation confirmation will not include a confirmation number, but will incorporate a message that The Rental Company
- 25 has received the reservation.
16. If the reservation is a non-Enterprise reservation, then the transaction is electronically transmitted to the intended rental car company's rental system.
17. This ends the use case.
- 30

1.5.3 *Alternative Flows*

The **Alternative Flows** of this use case can occur when conditions exist or specific USER feedback is provided.

1.5.3.1 *Initial Reservation Information Invalid*

5 If the initial reservation information is invalid (Step 5 of the **Basic Flow**), the system should present an error message to the USER and force the USER back into Step 2 of the **Basic Flow**.

10 1.5.3.1.1 It will be considered invalid if the Reference Number, Renter First Name, Renter Last Name, Rental Company, or Where Needed Value (Postal Code or Telephone Number) have not been included.

15 1.5.3.1.2 It will be considered invalid if the 'where needed' search criteria is a U.S. or Canadian telephone number and the first three digits (i.e., area code) meet the criteria below:

- 0XX
- 1XX
- the second and third digits equal (e.g., 800, 877, 888, etc.)

20 Where X equals any digit 0 through 9.

1.5.3.1.3 It will be considered invalid if the 'where needed' search criteria is a U.S. or Canadian telephone number that does not consist of 10 digits.

25 1.5.3.1.4 It will be considered invalid if the 'where needed' search criteria is a U.S. postal code that does not consist of 5 or 9 digits.

30 1.5.3.1.5 It will be considered invalid if the 'where needed' search criteria is a Canadian postal code that does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is a digit between 0 and 9.

1.5.3.2 Unauthorized Request/Authorized Request Search Matches

If either the search for Unauthorized Requests or the search for Authorized Request matches returns a positive result (Step 6 of the **Basic Flow**), the matching records will be presented to the USER. The matching records should be provided in summary form, and be distinctly identified as either Authorized Request matches or potential Unauthorized Request matches.

- For Authorized Request matches, the USER will have the ability to select the Authorized Request and move into the **MA-19 View Customer File** use case to view the details of the previously authorized rental. The USER will have the option of continuing or canceling this use case from the **MA-19 View Customer File** use case.
- For Unauthorized Request matches, the USER will have the ability to select the Unauthorized Request and move into the **MA-10 Authorize Request** use case to review and/or perform operations on the Unauthorized Request.

If the customer does not appear as an Unauthorized Request or Corporate Class Number match, the USER can select to continue to Step 7 of the **Basic Flow**.

1.5.3.3 Reservation Information Invalid

If an error is discovered in the validation of the reservation information submitted by the USER (Step 12 of the **Basic Flow**), the system will present the USER with an error message and return them to Step 9 of the **Basic Flow** (NOTE: If the USER submitted information from the Detailed Reservation screen, they should be returned to the **Display Detailed Reservation Alternative Flow** above). If the error is specific to a data field within the form, the field should be highlighted and the error described.

1.5.3.3.1 It will be considered invalid if the Reference Number, Renter First Name, Renter Last Name, Vehicle Condition, Rental Location, Authorized Number of Days, and at least one Renter Telephone number have not been included.

5

1.5.3.3.2 It will be considered invalid if the customer has established Reference Number editing and the Reference Number format does not meet the requirements of the customer's Reference Number definition. Reference Number definition is completed as part of the company profile. (Claim Number format definition will be defined in some cases in both the ARMS Web system and in the ARMS/400 system (e.g., Nationwide, GEICO). Claim number definition will have to be maintained in BOTH systems in cases where this overlap exists. We are unable to reuse the claim number format definitions due to technical complications.)

10

15

1.5.3.3.3 It will be considered invalid if any field identified as REQUIRED in the company/office profile is not included.

20

1.5.3.3.4 It will be considered invalid if any data entered violates the data type as specified by the ARMS Web database (i.e., alpha characters in a numeric field).

25

1.5.3.3.5 A warning will be presented to the USER if any defined limits identified in the company/office/user profile are exceeded (e.g., Maximum Number of Days Authorized). The system will allow the USER to submit the authorization from the warning.

30

1.5.3.3.6 It will be considered invalid if the Authorized Number of Days is included and is less than zero (0).

1.5.3.3.7 It will be considered invalid if the Date of Loss is greater than the current date.

1.5.3.3.8 It will be considered invalid if the first three digits (i.e., area code) of any U.S. or Canadian telephone number meet the criteria below:

- 0XX
- 1XX
- The second and third digits equal (e.g., 800, 877, 888, etc.)

Where X equals any digit 0 through 9.

1.5.3.3.9 It will be considered invalid if a U.S. or Canadian telephone number does not consist of 10 digits.

1.5.3.3.10 It will be considered invalid if a U.S. postal code does not consist of 5 or 9 digits.

1.5.3.3.11 It will be considered invalid if a Canadian postal code does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is a digit between 0 and 9.

1.5.3.3.12 It will be considered invalid if an E-mail address is included that does not include an '@' character.

1.5.3.4 *Cancel Use Case*

The USER should be capable of canceling the use case at any point prior to the submission of the reservation to the ARMS Web database. The USER should be returned to the previous activity/page that the USER was on prior to entering this use case.

1.6 Post-Conditions

- If successful, a reservation authorization is sent to ARMS.
- If unsuccessful, the system state will be unchanged.

5 1.7 Special Requirements

1.7.1 *Requirements for Reference Number Formatting*

10 The following statements are a set of requirements for providing custom reference number formatting for a customer. The ARMS Web system will allow customer companies to define a specific layout or format that they use as their standard reference number format, so that the reference number field used in the system is presented as separate fields and are easily recognizable and 'intuitive' to the USER. These requirements will be implemented to all system functions where the customer reference number is used.

15

20 *1.7.1.1 Customers must have the ability to define their reference number format (and in some cases, validations on specific portions of the reference number format) as part of the company profile. More than one reference number format can be stored per company, and each reference number format definition must have a unique identifier/name. The selection of which reference number format to use should be defined as part of the office profile using the reference number format unique identifier/name.*

25

30 *1.7.1.2 Reference numbers will be defined in 'segments'. Each segment will be presented to the USER as a separate field. For example, if the reference number format for the COMPANY were 45-A7456-1207, the reference number format would be defined to the system as a 2-character numeric field, a 5-character alphanumeric field, and a 4-character numeric field.*

1.7.1.3 *Customers must have the ability to define a set of 'valid values' for any given segment of the reference number format. Valid Values allow the customer to dictate what the valid entries for a given reference number segment would include. For example, if the second segment in the customer's reference number format must be a state abbreviation, the customer could define valid values for that segment as 'AL', 'AR', 'AK', etc. If the USER does not enter one of the valid values, an error would be generated to notify the USER to enter a 'valid' value. If no valid values are included for a reference number segment, all entry in to the field will be considered valid (assuming that the data type is correct). If valid values are specified, entry into the reference number segment MUST MATCH ONE OF THE VALID VALUES IDENTIFIED.*

1.7.1.4 *The system will display the reference number field(s) as it is described by the reference number format definition for the office.*

1.7.2 *Requirements for Finding Rental Location*

Below are the requirements for finding a rental location, across multiple rental car companies, in the ARMS Web system. ARMS Web will resolve a rental location and pass the location to ARMS for routing (which is a deviation from current state handling). These requirements were derived from the current state business requirements for the ARMS locator system.

1.7.2.1 *ARMS Web will always return a Rental Company's branch location for a reservation. For all ARMS Web reservations, the following rules for finding a rental location apply:*

1.7.2.1.1 For United States locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest branch that accepts ARMS reservations.

1.7.2.1.2 For International locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest open branch that accepts ARMS reservations. If no open branches are found, the closest branch that accepts ARMS reservations should be returned.

1.7.2.2 *When the rental branch location is determined, the system will retrieve the name, shipping address, telephone number and rates of the rental branch location and present them to the USER on the Create Reservation screen(s).*

1.7.2.3 *The system will only display Claims Connection (7680) as the location (with no rates) when no location can be found within the 50-mile radius. If Claims Connection is displayed, a message should be included to indicate that no rental branch location was found within a 50-mile radius of the search criteria, and Claims Connection will ensure that the reservation is handled appropriately.*

1.7.3 *Requirements for Routing a Reservation*

When a reservation is submitted to the ARMS Web system, routing of the reservation is required to ensure that the renter is called within two hours to confirm rental details. **Routing is done AFTER the reservation has been submitted to the ARMS Web system, and is transparent to the USER.** The reservation can be routed to the selected rental branch, to Claims Connection, or to a regional call center based on the following rules:

NOTE: These requirements were derived from the current state business requirements for the ARMS locator system.

1.7.3.1 *The system should automatically route submitted reservations to Claims Connection between Friday 11:00 pm and Sunday 11:00*

pm, regardless of whether the selected rental branch location is open or not.

1.7.3.2 The system should determine if the selected rental branch location on a submitted reservation is open or closed.

1.7.3.2.1 If the selected branch is open, the submitted reservation should be routed directly to the rental branch location (except in cases where a regional call center exists, see 1.7.3.3 below).

1.7.3.2.2 If the selected rental branch location is closed, the system will determine if the company that submitted the reservation has established after-hours handling of reservations. If the company has not established after-hours handling, the reservation is routed to the selected rental branch location (except in cases where a regional call center exists, see 1.7.3.3 below). If the company has established after-hours handling, the following rules apply:

1. The system will check the hours of availability for Claims Connection. Claims Connections Hours are 5:00 a.m. - 11:00 p.m. CST, 7 days a week. (Although we receive reservations 24 hours/day, 7 days/week, we do not route them between 11:45 pm and 4:30 am (CST). The only exception to this is Saturday night to Sunday.)

a. If Claims connection is open, the reservation will be routed to Claims Connection. (The insurance company customer, National Marketing and the Claims Connection Manager will determine whether or not Claims Connection makes a courtesy call to the renter).

- b. If Claims Connection is closed, the closest branch hours are checked to see if they will be open within 8 hours. If the branch will be open in 8 hours, the reservation will be routed to the rental branch location (except in cases where a regional call center exists, see 1.7.3.3 below). If the branch will not be open in the next 8 hours, the reservation will be routed to Claims Connection.

5

10 *1.7.3.3 The system should determine if the selected rental branch location on a submitted reservation has a regional call center.*

15

1.7.3.3.1 If the selected rental branch location has a call center to handle customer callbacks, the reservation should be routed to the call center.

20

1.7.3.3.2 If the selected rental branch location does not have a call center to handle customer callbacks, the reservation should be routed to the rental branch location.

25

1.7.3.4 The system should provide specific feedback indicating the reason a reservation was re-routed when the Authorization Confirmation is received. This will allow the USER to be aware of the reason for the change of location if they access the reservation while it is owned by someone other than the rental branch location selected when the reservation was originally submitted.

30

1.7.3.4.1 If the reservation is re-routed to Claims Connection because the selected rental branch location was closed, the system should provide a message (that will be accessible through the diary notes/notebook) that states the reservation was routed to Claims Connection because the rental branch location was closed when the reservation was submitted.

5 1.7.3.4.2 If the reservation is re-routed to a regional call center to expedite the callback process, the system should provide a message (that will be accessible through the diary notes/notebook) that states the reservation was routed to a regional call center to expedite the renter callback process.

10 1.7.3.5 *The system should include a message/note with the group/branch number and address of the rental branch location selected by the USER if the reservation is routed to any location (i.e., Claims Connection or otherwise) other than the rental branch location selected by the USER.*

15 1.7.4 **Maintenance of Source Systems**
This use case requires that information in the existing Locator and Special Instructions (AS/400) databases be kept current and it is assumed that the group responsible for maintaining these databases will continue to do so in the future. Locator is used to retrieve Rental Branch Location information, and Special Instructions is used to retrieve rate
20 information for a selected rental branch location.

1.8 **Extension Points**

25 An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below.

30 1.8.1 MA-10 - Authorize Request
The Authorize Request use case will be used to allow the USER to view and perform operations on an outstanding Unauthorized Request. The USER will not be returned to this use case on completion of the **Authorize Request** use case.

1.8.2 MA-19 - View Customer File

The View Customer File use case will be used to allow the USER to view the customer file when a matching authorized request is found and selected. The USER will have the option of ending the use case or be returned to Step 9 of the **Basic Flow** on completion of the View Customer File use case.

1.8.3 MA-02 - Find Rental Location

The Find Rental Location use case will be used to allow the user to find one or more alternate rental branch locations that can provide service to the customer. The USER should be returned to Step 9 of the **Basic Flow** upon completion of the Find Rental Location use case. If the USER selects a rental branch location, branch information (i.e., address, phone) should be returned and the appropriate fields should be populated on the Reservation screen.

1.8.4 MA-04 - Send Message

The Send Message use case will allow the USER to send a message to the Rental Company branch regarding the reservation, or select to store the message text with the reservation as a diary note (which is not sent to the branch). The USER should be returned to Step 9 of the **Basic Flow** upon completion of the Send Message use case.

1.8.5 MA-07 - Additional Charges

The Additional Charges use case will be used to add special charges to the reservation being created by the USER. The USER should be returned to Step 9 of the **Basic Flow** upon completion of the Additional Charges use case. Any Additional Charges captured should be returned and applied to the reservation. The existence of Additional Charges should be reflected on the reservation screen.

1.8.6 MA-08 - View Car Classes

The View Car Classes use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will

include the average number of passengers and luggage items that can be served by a vehicle in the specific car class. The USER should be returned to Step 9 of the **Basic Flow** upon completion of the View Car Classes use case. The car class selected by the USER should be applied to the reservation.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Initial Reservation Screen

The *Initial Reservation* screen provides the user interface and functions to support Steps 2 through 4 of the **Basic Flow**. The information captured on this screen will allow the system to perform several background search activities, and help to better construct the Quick/Detailed Reservation screen. All information captured on the *Initial Reservation* screen is required to create a new reservation, and is reused later in the reservation creation process.

2.1.1 Screen Layout - see Figures 103(a)-(e)

2.1.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter First Name	Text	15	Renter First Name	First Name	Renter First Name is a required field.
Renter Last Name	Text	20	Renter Last Name	Last Name	Renter Last Name is a required field.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number Purchase Order Number Corporate Class Number	Text	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	<p>'Reference' Number is a required field.</p> <p>'Reference' number should be presented in separate fields to correspond to the reference number format (segments) that has been defined by the USER profile.</p> <p>Insurance User - Claim Number Fleet User - Claim Number Dealership User - Purchase Order Number Corporate User - Corporate Class Number</p>
Claim Type Bill Type	Combo Box	20	Rental Type Description	Rental type description	<p>The values of the Rental Type field for the Insurance user class are: 'Insured', 'Claimant', 'Theft' and 'Uninsured'. The default value is '-Select Claim Type-'.</p> <p>Claim Type is a required field.</p>
	Text	15	Where Needed Value	Day Phone or Zip Code	Where Needed Value is a required field.
Postal Code	Radio Button	1	Where Needed Postal Code Indicator	NOT STORED	If the Where Needed Postal Code Indicator is set, the Where Needed Value should pre-populate the Renter Zip/Postal Code on the Quick/Detailed Reservation screen.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Phone	Radio Button	1	Where Needed Telephone Indicator	NOT STORED	<p>This should be the default radio button selected.</p> <p>If the Where Needed Telephone Indicator is set, the Where Needed Value should pre-populate the Renter Phone Number 1 on the Quick/Detailed Reservation screen.</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Create Reservation

The **Create Reservation** screen function will allow the USER to submit the information on the *Initial Reservation* screen and move on in the create reservation process. The system will use this information to perform background searches for Unauthorized Requests and Corporate Class Number Matches, and to build the Quick/Detailed Reservation screen appropriately.

2.1.3.1.1 The **Create Reservation** screen function is invoked through either a button click or an **Enter** keystroke.

2.1.3.1.2 The information captured on the *Initial Reservation* screen will be used to pre-populate the corresponding fields on the Quick/Detailed Reservation screen.

2.1.3.1.3 If the information submitted to the ARMS Web application is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to

the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or otherwise identified.

5 2.2 Authorization Matches Found Screen

The *Authorization Matches Found* screen provides the functions to support the **Unauthorized Request/Authorized Request Search Matches** alternative flow.

2.2.1 Screen Layout - see Figures 104(a)-(e)

10

2.2.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Handling for:	Output	35	User Name	First Name + Last Name	Should be presented as User First Name + User Last Name
Office	Combo Box	10	Office Location	external organization abbreviated name	<p>The values presented in the Office Location list should be limited to the offices that the user has been granted the authority to create a reservation.</p> <p>The default selection is the last selected office location. If the user has not selected an office, the default selection is the user's default office as defined in the user profile.</p> <p>Office is a required field.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter Name	Output	35	Renter Name	First Name + Last Name	<p>Should be presented as 'Renter Last Name + ", " + Renter First Name'</p> <p>Should provide a hyperlink to the corresponding Authorize Request record (see MA-10 Authorize Request use case).</p> <p>This field is in the "Unauthorized Request Matches" section of the "Authorization Matches Found" screen</p>
Claim Number Purchase Order Number Corporate Class Number	Output	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	<p>Should provide a hyperlink to the corresponding Unauthorized Request record.</p> <p>This field is in the "Unauthorized Request Matches" section of the "Authorization Matches Found" screen.</p> <p>Insurance User - Claim Number Fleet User - Claim Number Dealership User - Purchase Order Number Corporate User - Corporate Class Number</p>
Status	Output	15	Authorization Status	Status Description	<p>This field is in the "Unauthorized Request Matches" section of the "Authorization Matches Found" screen.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter Name	Output	20	Renter Name	First Name + Last Name	<p>Should be presented as Renter Last Name + Renter First Name</p> <p>Should provide a hyperlink to the corresponding Customer File.</p> <p>This field is in the “Authorized Request Matches” section of the “Authorization Matches Found” screen.</p>
Claim Number Purchase Order Number Corporate Class Number	Output	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	<p>Should provide a hyperlink to the corresponding Customer File.</p> <p>This field is in the “Reference Number Matches” section of the “Authorization Matches Found” screen.</p> <p>Insurance User - Claim Number Fleet User - Claim Number Dealership User - Purchase Order Number Corporate User - Corporate Class Number</p>
Claim Type Bill Type	Output	20	Rental Type Description	Rental type description	<p>This field is in the “Reference Number Matches” section of the “Authorization Matches Found” screen.</p> <p>Insurance User - Claim Type Fleet User - Claim Type Dealership User - Bill Type</p>
Status	Output		Authorization Status	Status Description	<p>This field is in the “Reference Number Matches” section of the “Authorization Matches Found” screen.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Authorized Amount	Output	9	Authorized Total Amount	CALCULATE D	This field is in the “Reference Number Matches” section of the “Authorization Matches Found” screen.

2.2.4 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 New Reservation

The **New Reservation** screen function button will allow the USER to close/continue beyond the *Authorization Matches Found* screen.

2.2.3.1.1 The **New Reservation** screen function is invoked through either a button click or through an **Enter** keystroke.

2.3 Quick Reservation Screen

The *Quick Reservation* screen provides support for Step 9 of the **Basic Flow**.

IMPORTANT NOTE: This is the minimum allowable set of fields on the *Quick Reservation* screen. The *Quick Reservation* screen will also include any fields indicated as QUICK RESERVATION in the company/office profile! See the Detail Reservation screen for all available fields.

2.3.1 Screen Layout see Figures 105(a)-(e)

2.3.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
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Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	35	User Name	First Name + Last Name	Should be presented as User First Name + User Last Name
Office	Combo Box	10	Office Location	external organization identifier	<p>The default value should be the primary office of the current user.</p> <p>The values presented in the Office Location list should be limited to the offices that the user has been granted the authority to create a reservation.</p> <p>If changed, the system should automatically refresh the screen and update the "Handling for" list to the users in the newly selected office with the ability to create a reservation.</p>
Handling for	Combo Box	35	Handling for	First Name + Last Name	<p>The combo list should include the users for the selected office location that have the authority to create a reservation.</p> <p>The default value should be 'Yourself'.</p> <p>The handling for users should be presented as User Last Name + User First Name in alphabetical order.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number Purchase Order Number Corporate Class Number	Text Box	30	Claim Number Purchase Order Number Corporate Class Number	Insurance Claim Number, PO#, CC#	<p>Should be populated by the Reference Number entered on the Initial Reservation screen.</p> <p>Reference number should be presented in separate fields to correspond to the claim number format (segments) that has been defined by the USER profile.</p> <p>If changed, the system should validate that no matching reference numbers exist (i.e., reference number matching). The user should be notified if a match exists.</p> <p>Reference Number is a required field.</p> <p>Insurance User - Claim Number Fleet User - Claim Number Dealership User - Purchase Order Number Corporate User - Corporate Class Number</p>
Claim Type Bill Type	Combo Box	20	Rental Type Description	Rental type description	<p>Should be populated by the Rental Type selected on the Initial Reservation screen.</p> <p>The values of the Rental Type field for the Insurance user class are: 'Insured', 'Claimant', 'Theft', and 'Uninsured'. Claim Type is a required field.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Vehicle Condition	Combo Box	20	Vehicle Condition	Driveable Flag + Repairable Flag	<p>The values of the Vehicle Condition field should include: 'Driveable', 'Non-Driveable', and 'Total Loss'.</p> <p>the default value should be '-Select Vehicle Condition-'.</p>
Renter First Name	Text	15	Renter First Name	First Name	<p>Should be populated by the Renter First Name entered on the Initial Reservation screen.</p> <p>If the Renter First Name changes, and an exact / Unauthorized request match exists on the Renter First Name + Renter Last Name combination, the user will be notified of this match.</p> <p>Renter First Name is a required field.</p>
Renter Last Name	Text	20	Renter Last Name	Last Name	<p>Should be populated by the Renter Last Name entered on the Initial Reservation screen.</p> <p>If the Renter Last Name changes, and an exact / Unauthorized request match exists on the Renter First Name + Renter Last Name combination, the user will be notified of this match.</p> <p>Renter Last Name is a required field.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Combo Box	10	Renter Phone Type 1		<p>The combo list should include the values: 'Home', 'Work', 'Mobile', and 'Pager'.</p> <p>The default value should be 'Select Type'</p>
	Text	15	Renter Phone Number 1	Day Phone	<p>If the Where Needed criteria entered on the Initial Reservation or Find a Rental Location screen was 'Telephone', the Where Needed Value from the screen should be populated in this field.</p> <p>At least one renter phone number is required.</p>
	Text	5	Renter Phone Extension 1	Renters Day Phone Extension	N/A
Post Code	Text	10	Renter Postal Code	Zip Code	If the Where Needed criterion entered on the Initial Reservation or Find a Rental Location screen was 'Postal Code', the Where Needed Value from the screen should be populated in this field.
Email address	Text Box	50	email Address		N/A
Send email confirmation to the renter	Check Box	1	email Confirmation Indicator		This field will default to unchecked.
Authorized Days	Text	3	Authorized Number of Days	Number Of Days Authorized	The Number of Days is a required field.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Policy Limits	Combo Box	10	Policy Daily Limit and Policy Maximum	Dollars Per Day Covered + Max \$ Covered	<p>The combo list should include the policy daily and maximum limits as defined in the company/office profile.</p> <p>The policy limits should be presented as 'Policy Daily Limit + "/" + Policy Maximum Limit'.</p> <p>This field should default to 'Select Policy Limits' if the Claim Type is 'Insured', 'Uninsured Motorist', or 'Theft'</p> <p>If the Claim Type is 'Claimant', this field should NOT be displayed.</p> <p>'Other' should be a selection in the list of options. If selected, the system will automatically replace the combo box with an open text box to allow the USER to type in a Daily Policy Limit, and a second open text box to allow the USER to type in a Maximum Policy Limit.</p>

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Combo Box	20	Authorized Rate	Vehicle Rate	<p>This field should be a combo box that lists all of the rates and car classes for the rental branch location in the format 'Rate + "" + Car Class'</p> <p>'Other' should be a selection in the list of options. If selected, the system will automatically replace the combo box with an open text box to allow the USER to type in a rate. A combo box should also be included that allows the USER to select a car class with selections to include 'Economy', 'Compact', 'Intermediate', 'Standard', and 'Full Size'.</p> <p>If the reservation is for an 'Insured', 'Uninsured', or 'Theft' Claim Type, the default selection for the field should be '-Policy Limits-'</p> <p>If the reservation is for a 'Claimant' Claim Type, the default selection for the field should be '-Select a rate-'.</p>
Additional Charge	Output		Additional Charges		Should include the Additional Charge Description, the Additional Charge Value, and the Additional Charge Type. More than one additional charge can exist.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Direct Billing %	Text	3	Authorized Direct Bill Percent	Bill To %	The Direct Bill % should default to 100%. The Direct Bill % is a required field.
Authorized Total Amount	Output	9	Authorized Total Amount	CALCULATE D	The authorized total amount field should show the total amount (w/o taxes and gov't surcharges) authorized based on the Number of Days Authorized, Rate, Policy Limits, and Direct Bill percent entered by the user. This field will calculate the total amount to be authorized (based on entry) when the USER clicks the Calculate screen function.
Rental Location	Output	30	Rental Location Branch Name	Branch Name	N/A
	Output	30	Rental Location Address	Address Line	N/A
	Output	30	Rental Location Address	Address Line2	N/A
	Output	25	Rental Location City Name	City	N/A
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A
	Output	3	Rental Location State / Province Code	State	N/A
	Output	20	Rental Location Telephone Number	Telephone Number	N/A

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Add the current location to my list of favorites	Check box	1	Add to Favorites Indicator	NOT STORED	Should default to false (unchecked). If checked, the system should add the current rental branch location to the favorites list in the user profile on the basis of the reservation. The branch location address will appear in the combo box on subsequent attempts until a description.
Favorite Locations	Combo Box	30	Favorite Location	location name	The combo list should include the descriptions of each favorite location as identified in the user profile. This field should default to '-Select a Favorite Location-'. If a favorite location is selected, the application will instantly retrieve the favorite location and refresh the reservation screen.
Note to Enterprise	Text	400	Authorization Message	message text	N/A
Note to Self Only	Text	400	Diary Note	diary note text	The system will store the text entered into this field in the ARMS Web database with the authorization, but the message will not be sent to the branch.

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 *More Locations*

5

The **More Locations** screen function allows the USER to select a different rental branch location using the Find Rental Location use case. Invoking this screen function will launch the USER into the **Find a Rental Location** use case.

2.3.3.1.1 The **More Locations** screen function is invoked through a button click.

10

2.3.3.2 *Additional Charges*

The **Additional Charges** screen function allows the USER to add, view, and modify any additional charges that they might authorize for a rental reservation (e.g., CDW). Invoking this screen function will launch the USER into the **Additional Charges** use case.

15

2.3.3.2.1 The **Additional Charges** screen function is invoked through a button click.

2.3.3.3 *View Car Class*

20

The **View Car Class** screen function allows the USER to view and select a Rental Car Class to apply to a reservation. Invoking this screen function will launch the USER into the **View Car Classes** use case.

25

2.3.3.3.1 The **View Car Class** screen function is invoked through a button click.

2.3.3.4 *Select a Favorite Location*

30

The **Select a Favorite Location** screen function allows the USER to change the rental branch location to one of the rental branch locations identified as a 'favorites' in their USER profile.

2.3.3.4.1 The **Select a Favorite Location** is invoked by selecting a value from the Favorite Locations drop-down list. The system should automatically retrieve the favorite location (and rates) when the value of this field is selected.

5

2.3.3.5 *Confirm Reservation*

The **Confirm Reservation** screen function allows the USER to submit all reservation information to the ARMS Web system, which will create a new reservation.

10

2.3.3.5.1 The **Confirm Reservation** screen function is invoked either through a button click or by an **Enter** keystroke.

15

2.3.3.5.2 If the information submitted to the ARMS Web application is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or otherwise identified.

20

2.3.3.6 *Cancel*

The **Cancel Reservation** screen function will allow the USER to leave the screen and return to their ARMS Web start page. No information is saved and no reservation is created.

25

2.3.3.6.1 The **Cancel** screen function is invoked through a button click.

2.4 **Reservation Confirmation Screen**

30

The *Reservation Confirmation* screen provides the user interface and functions to support Step 16 of the **Basic Flow**. This provides the USER with confirmation feedback on successful submission of the reservation.

2.4.1 Screen Layout - see Figures 106(a)-(c)

2.4.2 Screen Field Definition

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Office	Output	10	Office Location	external organization abbreviated name	
Handling for	Output	35	Handling for	First Name + Last Name	
	Output	150	Confirmation Statement	Authorized Days + Authorized Rate + Renter Last Name + Renter First Name	The screen should provide a statement that reads 'You just authorized' + Authorized Days + 'days at' + Authorized Rate/Policy Limits + '/day for' + Renter Last Name + ', ' + Renter First Name
Don't show me this confirmation page again	Check box	1	Delete confirmation page		If checked, the system should not show this page again. Instead the system will provide the confirmation statement (above) in the feedback section of the page that the user is returned to (the area of the EVERY page reserved for feedback, error messages, etc.)

5 2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

10 2.4.3.1 Return to Home Page

The **Return to Home Page** screen function will allow the USER to return to their home page from the reservation confirmation screen.

2.4.3.1.1 The **Return to Home Page** screen function is invoked through either a button click or an **Enter** keystroke.

2.4.3.2 *Change Reservation*

5 The **Change Reservation** screen function will allow the USER to go back into the Quick Reservation or Detailed Reservation screen and change any errors.

10 2.4.3.2.1 The **Change Reservation** screen function is invoked by clicking on the feedback hyperlink (e.g., You just authorized 3 days at \$29.39/day for Tom Hanks).

ARMS Web 3.0

Functional Design Specification

15 **Find a Rental Location**

Version 1.3

Find a Rental Location

20

1. Find a Rental Location Use Case

1.1 Application Overview

25 The following is a document used to illustrate the process of finding and selecting an alternate rental location for a reservation created using ARMS/Web 3.0. The intent for this release of the ARMS/Web application is to reach a much wider audience. This application will target a Multi-Vendor, Multi-Segment, and International customer base.

30 **1.2 Brief Description**

This use case describes the process of finding and selecting an alternate rental location for a reservation created in the ARMS/Web system. The USER will have

the ability to select the location search criteria they want to use (i.e. phone number or postal code), select the rental company and select to either review a list of nearby rental company locations or have the system automatically determine a rental company location based on the location search criteria. (The USER will also have the ability to select an alternate location by using the 'Favorite Locations' functionality built into the Create Reservation screens.) This use case provides the mechanism to return rental company location information, including address, rental company, and phone number to create a new reservation or define a favorite location.

1.3 Use Case Actors

The following actors will interact with this use case:

- **RENTAL ADMINISTRATOR** – The RENTAL ADMINISTRATOR will use the system to find and select a rental location for creating a reservation. This use case refers to a USER in the role of a rental administrator. There are various types of customers that the rental administrator would represent, which include corporate account holders, car dealerships, insurance companies, and others.
- **LOCATOR** – The LOCATOR system will determine the nearest rental branch location(s) based on the search criteria provided in this use case.
- **ARMS** – The ARMS system will receive/send transactions to ARMS/Web to retrieve the information regarding the rental company.
- **RENTAL CAR COMPANY** – A wide variety of rental car companies will be able to use this system as well. Each company will have the ability to initiate and manage their rentals through the use of this application.

1.4 Pre-Conditions

- The USER must be logged on to the ARMS/Web system.
- The USER must be creating a reservation or defining a favorite location.

1.5 Flow of Events

The Flow of Events includes all steps necessary to select rental location search criteria and retrieve an alternate rental branch location (s).

1.5.1 *Activity Diagram* – see Figure 107.

5

1.5.2 *Basic Flow*

The **Basic Flow** of the Find a Rental Location use case includes all of the required steps for the USER to select and input search criteria to find an alternate rental location. The USER will have the ability to view detailed information about a rental branch, and select a rental branch location to apply to a new reservation.

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1. The USER selects to find an alternate rental location.
2. The system will prompt the USER for pick up location search criteria (also referred to as 'where needed' search criteria). This allows the USER to input a telephone number, city, or postal code to find a rental branch (or branches) that accepts ARMS/Web reservations in a given area. (Rental branch locations have the ability to opt out of accepting ARMS/Web reservations.) The USER may also narrow the search by selecting a particular rental company along with the location search criteria. The USER will be given the option to view a list of rental branch locations matching the search criteria, or to have the ARMS/Web system automatically select the rental branch considered the Nearest Match.
3. The USER enters the required search criteria.
4. The USER submits the rental branch location search criteria.
5. The system will validate the rental branch location search criteria.
6. The system will retrieve/return a rental branch location (The requirements for retrieving a rental branch location can be found on page 5 of this document (Section 1.7.1 Requirements for Finding Rental Location).) (based on USER search/selection criteria) to be used by the **Create Reservation** use case. (This use case is also used to define favorite locations from the 'My

Profile' use case. The location will be returned to the 'My Profile' use case when the use case is entered from a 'My Profile' screen.) The rental branch location information for the selected branch on the **Create Reservation** screens will be automatically populated with the list below for the current **Create Reservation** transaction.

- Branch name (The Branch name has been included for future usability purposes (e.g., Network Allocation).)
- Address
- Telephone number
- Rates

7. The use case is complete.

1.5.3 *Alternative Flows*

1.5.3.1 *Search Criteria Entered is Invalid*

If the USER enters an invalid Postal Code or Phone Number as location search criteria, an error message should be displayed to the USER and the USER should be forced back into Step 2 of the **Basic Flow**. If the error is specific to a data field, the field should be highlighted and the error described.

1.5.3.1.1 It will be considered invalid if the 'where needed' search criteria is a telephone number and the first three digits (i.e., area code) meet the criteria below:

- 0XX
- 1XX
- the second and third digits equal (e.g., 800, 877, 888, etc.)

Where X equals any digit 0 through 9.

1.5.3.1.2 It will be considered invalid if the 'where needed' search criteria is a U.S. or Canadian telephone number that does not consist of 10 digits.

5 1.5.3.1.3 It will be considered invalid if the 'where needed' search criteria is a U.S. postal code that does not consist of 5 or 9 digits.

10 1.5.3.1.4 It will be considered invalid if the 'where needed' search criteria is a Canadian postal code that does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is a digit between 0 and 9.

1.5.3.2 No Rental Branch Locations Found

15 If the system cannot determine a rental branch location based on the search criteria entered by the USER, Claims Connection will be returned as the location and the use case will end. Please refer to section 1.7.1 Requirements for Finding Rental Location on beginning on page 5 of this functional specification for handling of this situation.

20

1.5.3.3 View a List of Rental Branch Locations

25 If the USER opts to view a list of matching rental locations, the list of matching locations will be displayed after Step 5 of the **Basic Flow**. The USER will have the ability to select one of these locations, view more detail about the locations (i.e., maps, hours of operation), or perform another location search by entering new search criteria.

30 1.5.3.3.1 If the USER requests additional detail on a specific rental branch in the **View a List of Rental Branch Locations Alternate Flow**, the system should display a screen with the selected branch's additional information (Rental Company, Branch name, Addresses, telephone/fax numbers, Map to the rental

branch location, Hours of operation). The USER should either select the location from this screen (and be returned to Step 6 of the **Basic Flow**), or be returned to the list of matching locations by closing/continuing from this screen.

5

1.5.3.3.2 If the USER wishes to perform another rental branch location search in the **View a List of Rental Branch Locations Alternate Flow**, the system should return the USER to Step 2 of the **Basic Flow**.

10

1.5.3.4 Use Case Cancellation

The USER should be capable of leaving the use case at any time.

1.6 Post-Conditions

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- If successful, a rental branch location will have been determined and returned to the **Create Reservation** use case.
- If unsuccessful, the system state remained unchanged.

1.7 Special Requirements

20

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.7.1 Requirements for Finding Rental Location

25

Below are the requirements for finding a rental location in the ARMS/Web system. ARMS/Web will resolve a rental location and pass the location to ARMS for routing (which is a deviation from current state handling). These requirements were derived from the current state business requirements for the ARMS locator system.

30

1.7.1.1 ARMS/Web will always return a rental branch location for a reservation. For all ARMS/Web reservations, the following rules for finding a rental location apply:

5 1.7.1.1.1 For United States locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest branch (or branches) that accepts ARMS reservations. If the USER selects to review a list of rental branch locations, an array of rental branch locations meeting these criteria should be
10 returned.

1.7.1.1.2 For Canadian locations, the locator will search a 50-mile radius around the renter's phone number or postal code for the closest open branch (or branches) that accepts ARMS
15 reservations. If no open branches are found, the closest branch (or branches) that accepts ARMS reservations should be returned. If the USER selects to review a list of rental branch locations, an array of rental branch locations meeting these criteria should be
20 returned.

2.7.1.2 When the rental branch location is determined, the system will retrieve the group/branch number, name, shipping address, and telephone number of the rental branch location and present them
25 to the USER on the Create Reservation screen(s).

3.7.1.3 The system will only display Claims Connection (7680) as the location (with no rates) when no location can be found within the 50-mile radius. If Claims Connection is displayed, a message
30 should be included to indicate that no rental branch location was found within a 50-mile radius of the search criteria, and Claims Connection will ensure that the reservation is handled appropriately.

1.7.2 Maintenance of Source Systems

This use case requires that several existing AS/400 databases be used to query for information:

- Locator Database
- Office Information Database

The use case requires that the information in these databases be kept current and it is assumed that the group responsible for maintaining these databases will continue to do so in the future.

10 1.8 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Location Search Criteria Screen

This screen allows the USER to select/input the search criteria they want to use to find a rental location. This screen supports Steps 2 and 3 of the **Basic Flow**.

2.1.1 Screen Layout - see Figures 108(a) and (b)

2.1.2 Search for Rental Location

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
--------------	------	------	-------------------	------------	----------------------

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Country	Combo box	14	Country	country code	This list should consist of United States and Canada. This will expand in future releases. The selection will default to the home country of the USER as defined in the USER profile.
	Input Text	20	Where Needed Value	Where Needed Value	
Rental Company	Combo box	20	Rental Company		This is a list of all the rental companies that are participating.
Postal/Zip Code	Radio Button	1	Postal/Zip Code Button	NOT STORED	
Telephone	Radio Button	1	Telephone Button	NOT STORED	This should be the default radio button selection.
City	Radio Button	1	City Radio Button	NOT STORED	
Automatically select the nearest office	Checkbox	1	Nearest match Selection		This checkbox should default to checked.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Next

The **Next** screen function will allow the USER to submit the information on the *Location Search Criteria* screen and initiate the search for matching locations.

2.1.3.1.1 The **Next** screen function is launched through either a button click or by using the **Enter** keystroke.

5 2.1.3.1.2 If the information submitted to the ARMS/Web system is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or
10 otherwise identified.

2.2 Matching Location Screen

This screen allows the USER to review/select a rental location based on the search criteria entered on the *Location Search Criteria* screen. The screen will present 5 matching records at a time to the USER. The USER is given the
15 option of viewing additional detail on a location or entering new search criteria. If there are more locations selected by the search, the USER will view the next locations (up to 5). This screen supports Step 4 of the **Basic Flow**.

2.2.1 *Screen Layout* - see Figures 109(a) and (b)

20

2.2.2 *Screen Field Definition*

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
	Radio Button	1	Selector Radio Button		<p>A radio button should be presented for every rental branch location record in the list.</p> <p>Only one radio button may be selected. The rental branch location that is the shortest distance from the search criteria entered should be the default.</p>

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
Location	Output	30	Rental Location Address	Address Line	A location should be presented for every rental branch location record in the list.
Rental Company	Output	30	Rental Company name		The name of the rental company that is available from the search criteria.
Miles	Output	4	Miles from Search Criteria		Miles from search criteria should be presented for every rental branch location record in the list.
City	Output	18	Rental Location City Name	City	A city should be presented for every rental branch location record in the list.
State/Province	Output	2	Rental Location State/Province Code	State	A state/province should be presented for every rental branch location record in the list.
Country	Drop Down	14	Country	NOT STORED	This list should consist of United States and Canada. This will expand in future releases. The selection will default to the home country of the USER as defined in the USER profile.
	Input Text	12	Where Needed Value	Where Needed Value	
Rental Company	Combo box	20	Rental Company		This is a list of all the rental companies that are participating.
Postal/Zip Code	Radio Button	1	Postal/Zip Code Button	NOT STORED	
Telephone	Radio Button	1	Telephone Button	NOT STORED	This should be the default radio button selection.
City	Radio Button	1	City Radio Button	NOT STORED	
Automatically select the nearest office	Checkbox	1	Nearest Match Selection	NOT STORED	This should default to checked.

2.2.3 *Screen Function Definition*

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 *Select this Location*

The **Select this Location** screen function will submit the selected rental branch location in the Rental Location Information Container to the ARMS/Web system, to be used by the **Create Reservation** use case.

2.2.3.1.1 The **Select this Location** screen function is launched through either a button click or by using the **Enter** keystroke.

2.2.3.2 *Next X of Y*

The **Next X of Y** screen function will allow the USER to view the next five rental locations (unless less than five records exist) that match the search criteria. For example, if a total of 8 locations were returned as part of the search, this screen function would be presented as **Next 3 of 8**.

2.2.3.2.1 The **Next X of Y** screen function is launched through a button click.

2.2.3.2.2 The **Next X of Y** screen function should not be presented if 5 or fewer records are retrieved.

2.2.3.2.3 The **Next X of Y** screen function should have the X values replaced by the number of records remaining to view (up to five) in this search.

2.2.3.2.4 The **Next X of Y** screen function should have the Y value replaced by the number of total records returned in the search.

5 2.2.3.3 *Previous 5 of Y*

The **Previous 5 of Y** screen function will allow the USER to view the previous five rental locations that matched the search criteria (and were previously reviewed).

10 2.2.3.3.1 The **Previous 5 of Y** screen function is launched through a button click.

15 2.2.3.3.2 The **Previous 5 of Y** screen function should not be presented on the initial search results screen. The **Previous 5 of Y** screen function should only be available if the USER has selected the **Next X of Y** screen function.

20 2.2.3.3.3 The **Previous 5 of Y** screen function should have the Y value replaced by the number of total records returned in the search.

2.2.3.4 *Details/Map*

25 The **Details/Map** screen function allows the USER to review additional information about a rental location presented in the list of matching records. Selecting this screen function will open the *Location Details* screen for the rental branch selected.

30 2.2.3.4.1 The **Details/Map** screen function is launched through a button click.

2.2.3.4.2 Each rental branch location presented in the list of matching locations should have its own **Details/Map** button.

2.2.3.5 Search Again

The **Search Again** screen function will allow the USER to submit the Location Search Criteria Container information on the *Matching Location* screen and re-initiate the search for matching locations.

2.2.3.5.1 The **Search Again** screen function is launched through a button click.

2.2.3.5.2 If the information submitted to the ARMS/Web system is invalid or incomplete, this screen function should prompt the USER with an error. The error should be specific as to the cause of the failure. All information previously entered should remain populated in each field, with the problem field highlighted or otherwise identified.

2.3 Location Details Screen

This screen allows the USER to view additional details for a given rental location. This screen supports the **View Location Detail** alternate flow.

2.3.1 *Screen Layout* - see Figures 110(a) and (b)

2.3.2 Screen Field Definition

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
	Output		Rental Location Name	Rental Location	
	Output		Rental Companies Name		
	Output		Rental Location Address	Address Line	
	Output		Rental Location City Name + “,” + Rental Location	State + City + Zip Code	Rental Location City Name + “,” + Rental Location State/Province Code + “” + Rental Location Postal/Zip Code

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
	Output Text		Rental Location Telephone Number	Telephone Number	
Mon	Output Text		Rental Location Start Hours of Operation + "-" + R		<p>Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation</p> <p>This should be filled with the start and end hours of operation for the 'Monday' value in the hours of operation array.</p>
Tue	Output Text		Rental Location Start Hours of Operation + "-" + R		<p>Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation</p> <p>This should be filled with the start and end hours of operation for the 'Tuesday' value in the hours of operation array.</p>
Wed	Output Text		Rental Location Start Hours of Operation + "-" + R		<p>Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation</p> <p>This should be filled with the start and end hours of operation for the 'Wednesday' value in the hours of operation array.</p>
Thu	Output Text		Rental Location Start Hours of Operation + "-" + R		<p>Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation</p> <p>This should be filled with the start and end hours of operation for the 'Thursday' value in the hours of operation array.</p>

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
Fri	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Friday' value in the hours of operation array.
Sat	Output Text		Rental Location Start Hours of Operation + "-" + R		Rental Location Start Hours of Operation + "-" + Rental Location End Hours of Operation This should be filled with the start and end hours of operation for the 'Saturday' value in the hours of operation array.

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Select this Location

The **Select This Location** screen function will submit the selected rental branch location to the ARMS/Web system, to be used in other parts of the system.

2.3.3.1.1 Clicking on the Select This Location hyperlink launches the Select This Location screen function.

2.3.3.2 Previous

The **Previous** screen function will return the USER to the list of locations that was presented based on the search criteria that were entered.

5 2.3.3.2.1 Clicking on the Prev button launches the Previous screen function.

2.3.3.3 *Enlarge Map*

10 The **Enlarge Map** Screen function will retrieve a larger graphic image of the map to the location. The larger image will be placed in the same screen location of the *Location Details* screen.

15 2.3.3.3.1 Clicking on the Enlarge Map hyperlink launches the Enlarge Map screen function.

2.3.3.4 *Reduce Map*

20 The **Reduce Map** Screen function will retrieve a smaller graphic image of the map to the location. The smaller image will be placed in the same screen location of the *Location Details* screen.

2.3.3.4.1 Clicking on the Reduce Map hyperlink launches the Reduce Map screen function.

2.3.3.5 *Zoom In*

25 The Zoom In screen function will retrieve a more specific (more detailed) graphic image of the map to the location. The more specific image will be placed in the same screen location of the *Location Details* screen.

30 2.3.3.5.1 Clicking on the Zoom In hyperlink launches the Zoom In screen function.

2.3.3.6 *Zoom Out*

The Zoom Out screen function will retrieve a more general (less specific) graphic image of the map to the location. The more general image will be placed in the same screen location of the *Location Details* screen.

5

2.3.3.6.1 Clicking on the Zoom Out hyperlink launches the Zoom Out screen function.

3. Questions and Answers

10

Issue Number: 307

Question: We have heard from the business that the search by name criteria needs to be better. Today we search by the first three letters of the last name. We need to know what criteria is the preferred method of search to be done.

15

For example: Do we search the entire last name and first name?

Do we search by the first three letters of the last name and the first letter for the first name?

20

Do we search by first letter of last name and first letter of first name?

Need the Business Rule.

Status: 12 User Review

25

Resolution: 4-17-00, Sean O'Donnell - We have spoken to the Rental Redesign folks to find out how they are doing last/first name matching, and they are not planning to search by name in the new rental system (Telephone Number, Driver's License, and SSN only). They were going to have an 'implied wildcard' search by name, but it was taken out in USER review.

30

Issue Number: 310

Question: Do we want the ARMS/Web to have search available by phone, zip code/postal code, city and state. Current state only allows for phone number searches. Do we want to search other than phone number

5 For example: Do we want to search by phone number or zip code?
Do we want to search by phone number or zip code or city?
Need Business Rule

Status: Closed - Resolved

10

Resolution: 3-16-00, Jen Cavanaugh - Talking with Dave Smith. 3-22-00, Issue Mtg. Search by phone # & zip code only.

(SHOULD THE ANSWER BE "SEARCH BY PHONE # AND/OR ZIP CODE?") yes it is and/or could be both or one.

15

Issue Number: 311

Question: If a daily rental branch is closed, how do we want the system to work? Current state it defaults to Claims Connection. We need clarification on how this should work in the ARMS/Web environment.

20

3-17-00, Application Team - What do we want to see in the locator, do we want to see just open only or all? If no branch is open do we return to Claims Connection?

25

Status: Closed - Resolved

Resolution: 3-16-00, Jen Cavanaugh - Stan's team is going to get w/claims Connection to see how this process works after hours. From there we will make some business decisions 3-20-00, Jennifer Cavanaugh - Stan's team needs to research how ARMS & Retail Res Locator works & how they differ. Then we will re-review the question.

30

3-27-00, Sean - I talked with Trent Tinsley and Kim Devallance on this topic, which was EXTREMELY helpful. If the adjuster selects a closed branch, the system will route the ticket based on the type of service established in the insurance company profile:

5

Insurance companies that do NOT have 24-hour service, the reservation will be routed to the branch that was selected. The branch will do a callback in the morning when they re-open. Insurance companies that have 24-hour service have their reservations re-routed to Claims Connection (who will do a callback prior to 9 pm in any time zone unless otherwise specified by an adjuster) if the selected office is not open. This determination is made in the background after the adjuster submits the reservation. Claims connection will re-route the reservation to the appropriate branch when the customer is contacted.

10

15

Essentially, the way that location selection is handled today can/should be supported in the future version of ARMS/Web (location selection is implied through the F2 - Rates function of ARMS/400). Please let me know if you have questions with regard to this issue update/resolution.

20

Issue Number: 374

25

Question: In the Create Reservation functional specification, we have stated that the system will pull a location and rates immediately for the USER. The issue arises when we have no location to retrieve, in cases that the 'where needed' search criteria is weak or we don't have a branch within 50 miles of the search area. In the current state, we show Claims Connection as if it were a branch in this situation. This can be somewhat confusing (to see the location of Hanley Road in St. Louis if you are in Delaware). In the future state, we think it may be a good idea to notify the USER that no location was found, and that the reservation would be handled by Claims Connection (see example message below). Any thoughts on this question...

30

EXAMPLE MESSAGE:

A rental branch could not be found within 50 miles of 555-512-5000. Claims Connection will ensure your reservation is handled immediately. Please call 800-CLAIMSCONNECTION for additional assistance.

5 **Status:** Pending

10 **Resolution:** 5-8-00, Response from Sean O'Donnell: Dave liked the idea, and so did Kim. Have not heard from Randy on this one, though. Let me know if you need me to follow up, otherwise this will be written in to the specification for Finding a rental location.

ARMS Web 3.0

Functional Design Specification

Send Message

15

Version 1.1

Send Message

20 **1. Send Message Use Case**

1.1 Brief Description

 This use case describes the process of capturing messages and diary notes associated with a rental reservation/authorization. The USER can elect to either have the message sent to the Enterprise rental branch location responsible for the reservation/authorization (MESSAGE in this document), or to store the note in the ARMS Web system without sending the message to Enterprise (DIARY NOTE in this document). All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

30

NOTE: *This is a sub-use case that must be accessed from another use case. For example, a USER may send a message while creating a reservation, maintaining an authorization, or completing an extension.*

5 1.2 **Use Case Actors**

The following actors will interact with this use case. All actors are referred to as USER throughout this use case:

- 10 • **ADJUSTER** – The ADJUSTER will use this use case to enter and send a message about a reservation/authorization to the rental branch location that is responsible for the reservation/authorization. The ADJUSTER may also use this use case to capture diary notes.
- 15 • **PROCESSOR** – The PROCESSOR will use this use case to enter and send a message about a reservation/authorization to either the rental branch location or the ADJUSTER that is responsible for the reservation/authorization.
- 20 • **ENTERPRISE ADMINISTRATOR** – The ENTERPRISE ADMINISTRATOR will use this use case to send a message on a specific transaction to notify the rental branch location or other user of issues/complications in transmission of the transaction.

20 1.3 **Pre-Conditions**

- The USER must be signed-on to the ARMS Web system.
- The USER must have selected an authorization that is in a state that allows MESSAGES or DIARY NOTES.

25 1.4 **Flow of Events**

The Flow of Events includes all steps necessary to enter MESSAGES and DIARY NOTES.

1.4.1 *Activity Diagram* – see Figure 111.

1.4.2 *Basic Flow*

The **Basic Flow** of the Send Message use case includes all of the required steps for the USER to enter a MESSAGE or DIARY NOTE.

1. The USER will indicate that they want to send a MESSAGE for a reservation/authorization.
- 5 2. The system will display a screen that will capture the message/note text.
3. The USER will enter the message/note text.
4. The USER returns to the parent use case, and the system stores the text message to be sent at a later time (see **Special**
- 10 **Requirements**).
5. This ends this use case.

1.4.3 *Alternative Flows*

15 1.4.3.1 *Send Diary Note Only*

The USER will have the ability to indicate that the MESSAGE text should be stored as a DIARY NOTE only in Step 3 of the **Basic Flow**. This text should not be sent to the Enterprise rental branch location handling the reservation/ticket.

20

1.4.3.2 *Use Case Cancellation*

The USER should be capable of leaving the use case at any time.

1.5 **Post-Conditions**

- 25 • If successful, the message/note text will be updated in the ARMS Web database. MESSAGES requested to be sent to the rental branch location are sent to ARMS.
- If unsuccessful, the system state remains unchanged.

30 1.6 **Special Requirements**

1.6.1 *Submit Message Responsibilities*

2.1.2 Message Screen Container

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
Note to Enterprise	Input Text	200	Message Text	message text	Text entered into this field will be sent to the Enterprise rental branch location.
Note to Self Only	Input Text	200	Message Text	Diary text	Text entered into this field will be stored in the ARMS Web database but will not be sent to the Enterprise rental branch location.

2.1.3 Screen Function Definition

The Message screen container will use the functions of the parent screen to have the message sent.

3. Questions and Answers

Issue Number: 341

Question: Current state ARMS400 allows user to enter maximum of four lines of fifty characters. Current state ARMS has program limitation of ten lines of fifty characters. ARMS Web will be limited by current state ARMS. Should that be the planned maximum for ARMS Web or ??? One idea would be to have the number of lines/characters profiled. Then the size of the message box that is displayed to the user would be limited by this profiled amount.

Status: Closed - Resolved

Resolution: 3-30-00, Kim De Vallance - I think ten lines of fifty characters to be entered by any user at a time is more than enough. I don't really for see the need to profile this by company.

Issue Number: 342

Question: Current state allows message to be sent on unauthorized requests only if they have not been assigned to an adjuster. How should future state work? If we allow messages on assigned unauthorized requests, we must keep in mind that we are defaulting the Direct-Bill To percent at 100% on all auth. screens. When the adjuster submits the message, they MAY be unintentionally authorizing the request.

Status: Closed - Resolved

Resolution: 3-30-00, Kim De Vallance - Kim: we should never send an authorization to the branch if all the adjuster did was key in a message. The message will either appear in ECARS under res notes or callback notes, but should never appear to the branch as an authorization. We not only need to give the adjuster the ability to send a message, but they should be able to change info (such as claim number, claim type, etc.) before assigning the request to the adjuster, thereby enabling the adjuster to see the correct info when authorizing or denying a DB. We hear this request a lot from our customers.

Functional Design Specification**Additional Charges****Version 1.2****Additional Charges****1. Additional Charges Use Case****1.1 Brief Description**

The Additional Charges use case will allow the USER to view, add, or modify/remove any additional charges that may be associated with a rental authorization. Additional Charges such as Collision/Damage Waiver (CDW),

Mileage Charge, or any other rental related charge could be authorized by a USER through this function.

1.2 Use Case Actors

5 The following actors will interact with this use case:

- **ADJUSTER** – The **ADJUSTER** will use this use case to view, add, or modify any additional charges that are associated with a rental authorization.

1.3 Pre-Conditions

- 10
- The USER must be signed-on to the ARMS Web system.
 - The USER must have a reservation or open ticket selected (active).

1.4 Flow of Events

15 The Flow of Events will include the necessary steps to view, add and modify additional charges associated with a rental authorization.

1.4.1 Activity Diagram – see Figure 113.

1.4.2 Basic Flow

20 The **Basic Flow** of the Additional Charges use case includes all of the required steps to view, add, or modify Additional Charges as part of an authorization.

1. The USER will select Additional Charges for the active reservation or open ticket.
- 25 2. The system will prompt the USER to add, modify or remove Additional Charges.
3. The USER will view, add, or modify Additional Charges that will be authorized.
4. The USER will submit the Additional Charges to the system.
- 30 5. The system will validate the Additional Charges entered by the USER.

6. The system will return the USER to the active reservation or open ticket and populate Additional Charges. (The Additional Charges should **not** be submitted to the ARMS Web database until the USER submits the changes on the active reservation or open ticket.)
7. This ends this use case.

1.4.3 *Alternative Flows*

1.4.3.1 *Additional Charges Invalid*

If the Additional Charges entered by the USER are invalid, the system should present an error message to the USER and force the USER back into Step 2 of the **Basic Flow**. The system will declare additional charges invalid in the following circumstances:

1.4.3.1.1 It will be considered invalid if the additional charge type is 'Dollars per Day' or 'Dollars per Rental' and the additional charge value entered is greater than \$999.99.

1.4.3.1.2 It will be considered invalid if the additional charge type is 'Dollars per Day' or 'Dollars per Rental' and the additional charge value entered is less than \$0.

1.4.3.1.3 It will be considered invalid if the additional charge type is 'Percentage of Rental' and the additional charge value entered is greater than 100%.

1.4.3.1.4 It will be considered invalid if the additional charge type is 'Percentage of Rental' and the additional charge value entered is less than 0%.

1.5 **Post-Conditions**

- If successful, the Additional Charges that were added or modified will be returned to the active reservation or open ticket.

- If unsuccessful, no Additional Charge will be added to the active reservation or open ticket.

1.6 Special Requirements

5 The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 *Submit Additional Charges Responsibilities*

10 The parent use case that accessed this function will have the responsibility of submitting the additional charges to the ARMS Web database. Any additional charges returned to a parent use case should be reflected on the screen within that use case. For example, if additional charges were being added as part of the Create Reservation process, the
15 Create Reservation screens should have some indication that additional charges have been added.

1.6.2 *Additional Charges Descriptions*

20 Below are the current additional charge descriptions used in the ARMS/400 system in the current state:

- | | |
|------------------|-------------------|
| • DAMAGE WAIVER | • SPECIAL |
| • PAI | • DROP CHARGE |
| • MILEAGE CHARGE | • MISC CHARGES |
| • HOURLY | • SLP |
| • DAILY | • UNDERAGE DRIVER |
| • WEEKLY | • BABY CAR SEAT |
| • MONTHLY | • SKI RACK |

1.7 Extension Points

None.

25 2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

5 2.1 Additional Charges

This screen will allow the user to view, add, modify or remove additional charges associated with a reservation/authorization.

2.1.1 Screen Layout – see Figure 114.

10

2.1.2 Screen Field Definition

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
CDW (Collision Damage Waiver)	Check Box	1	CDW (Collision Damage Waiver)		
PAI (Personal Accident Insurance)	Check Box	1	PAI (Personal Accident Insurance)		
Underage Driver	Check Box	1	Underage Driver		
Drop Charge	Check Box	1	Drop Charge		
Mileage Charge	Check Box	1	Mileage Charge		
Misc. Charge	Check Box	1	Misc. Charge Check Box		
Create Charge Type	Text Box	15	Additional Charge Description		A description of the additional surcharge to be authorized.
Amount	Text Box	6	Additional Charge Value		An Amount text box should be included for every check box on the screen.

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
Type	Combo Box	20	Additional Charge Type		<p>A Type combo box should be included for every check box on the screen.</p> <p>Values include: Dollars per Day (DEFAULT); Dollars per Rental; Percentage of Rental</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Create More Surcharges

The Create More Surcharges screen function will allow the USER to select the hyperlink and have an additional Misc. Charge line added to the screen. For example, the Screen Layout above shows only one Misc. Charge box. If a USER were to click on the Create More Surcharges hyperlink, the screen would refresh and provide the user with two Misc. Charges boxes. The USER is not limited to the number of Misc. Charge boxes that can be added.

2.1.3.1.1 The Create More Surcharges screen function is invoked through clicking a hyperlink.

2.1.3.2 Process

The Process screen function allows the USER to save the additional charges that are being authorized and return to the active reservation or open ticket. The active reservation or open ticket will reflect that additional charges have been added.

2.1.3.2.1 The Process screen function is invoked through a button click or through an **Enter** keystroke.

2.1.3.3 *Previous*

5 The Previous screen function will allow the USER to return to the active reservation or open ticket without saving the updates to additional charges.

10 2.1.3.3.1 The Previous screen function is invoked through a button click.

3. Questions and Answers

None.

15 Functional Design Specification

View Car Class

Version 1.2

20 View Car Class

1. View Car Class Use Case

1.1 Brief Description

25 This use case will allow the USER to view examples of automobiles that are part of each Enterprise Car Class. The USER will have the ability to select a car class and have the rate for the car class apply to the reservation/authorization.

1.2 Use Case Actors

30 The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use the case to view and/or select the car class that will apply to a reservation.

1.3 Pre-Conditions

- The USER must be signed-on to the ARMS Web system.
- The USER must have a reservation or open ticket selected.

5 1.4 Flow of Events

The Flow of Events will include the necessary steps to view and/or select the car class to apply to a rental reservation.

1.4.1 Activity Diagram - see Figure 98.

10

1.4.2 Basic Flow

The **Basic Flow** of the View Car Class use case includes all of the required steps to view and/or select a car for a rental reservation. If a car class is selected, it will be used to populate rate information on a rental authorization.

15

1. The USER will select View Car Class from the active reservation or open ticket.
2. The system will display a car class detail screen. If the USER had previously selected a car class (for example, on the Create Reservation screen), the car class selected will be displayed. If no car has been selected, the system will display the Standard car class.
3. The USER will select the car class to apply to the reservation or open ticket.
4. The system will return the USER to the active reservation or open ticket and populate car class information based on the car class selected.
5. This ends this use case.

20

25

30

1.4.3 Alternative Flows

1.4.3.1 Select Alternate Car Class

From Step 2 of the **Basic Flow**, the USER will have the ability to view an alternate car class. The car classes that will be available to view include:

- Economy
- Compact
- Intermediate
- Standard
- Full Size
- Premium

If the USER selects an alternate car class, the system will refresh and present the details of the new car class.

1.4.3.2 Populate Car Class Rates

If a rental branch location has already been selected prior to entering this use case, the selection of a car class will populate the rates that apply to the selected car class on the active reservation or open ticket. This alternate flow returns the USER to Step 4 of the **Basic Flow**.

1.5 Post-Conditions

- If successful, the selected Car Class will be returned to the active reservation or open ticket.
- If unsuccessful, the system state is unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 Modify Car Class Selection Results

The USER may change the results of this use case as part of the active reservation or open ticket.

1.7 Extension Points

None.

5 2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

10 2.1 Car Class Detail Screen

This screen (see Figure 99(a)) will allow the USER to view detailed information about Enterprise car classes. The USER will also have the ability to select a car class to apply to a rental reservation / authorization.

15 2.1.1 Screen Layout - see Figure 99(a)

2.1.2 Car Class Details

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
	Output	20	Car Class Name		This should be the name of the currently selected car class.
(Person Image)	Output	2	Car Class Person Capacity		This should provide the average person capacity of the selected car class.
(Luggage Image)	Output	2	Car Class Luggage Capacity		This should provide the average luggage capacity of the selected car class.
	Hidden	255	Car Class Image Source		This should provide a picture of an example car within the selected car class.
	Output	120	Car Class Detail Description		This should provide a description of the selected car class.

Screen Label	Type	Length	Screen Field Name	Data Field	Screen Specific Rule
Economy	Output		Economy Car Class		This should be a hyperlink to the Economy car class detail.
Compact	Output		Compact Car Class		This should be a hyperlink to the Compact car class detail.
Intermediate	Output		Intermediate Car Class		This should be a hyperlink to the Intermediate car class detail.
Standard	Output		Standard Car Class		This should be a hyperlink to the Standard car class detail.
Full Size	Output		Full Size Car Class		This should be a hyperlink to the Full Size car class detail.
Premium	Output		Premium Car Class		This should be a hyperlink to the Premium car class detail.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Select This Car Class

The **Continue** screen function will allow the USER to select the car class to apply to a reservation.

2.1.3.1.1 The **Continue** screen function is invoked through either a button click or through an **Enter** keystroke.

2.1.3.2 Previous

3. **Questions and Answers**
None.

Version 1.1

1. Assign a Request Use Case

20 This use case describes the process of how a USER will review unassigned authorization request and assign them to an adjuster for further handling.

The following actors will interact with this use case:

- ### 30 1.3 Pre-Conditions

- The USER must be signed-on to the ARMS Web system.
- The USER should be authorized to assign a request.

- If there are unassigned requests present, the USER has selected the link from the Review List Action Items Use Case to enter this use case.

1.4 Flow of Events

5 The Flow of Events will include the necessary steps to make changes and updates to “Assign an Action Item”.

1.4.1 Activity Diagram – see Figure 115.

10 1.4.2 Basic Flow

1. The USER selects the unassigned authorizations link.
2. The system retrieves all unassigned request summaries.
3. The system retrieves all OFFICE IDs within ARMS Web.
4. The system retrieves all USER IDs within the OFFICE.
- 15 5. The system displays the unassigned authorization summaries with the offices and adjusters.
6. The USER selects an adjuster to assign to the request.
7. The system will update the ARMS Web database.
8. This ends the use case.

20

1.4.3 Alternative Flows

1.4.3.1 *Cancel Use Case*

25 The USER should be capable of leaving the use case at any point prior to assigning the reservation information to an ADJUSTER.

1.4.3.2 *Modify a Request*

Before step 6 of the basic flow, the USER should be able to make changes to the authorization.

30

1.4.3.3 *Select a different office*

Before step 6 of the basic flow, the USER should be able to select a different office for this authorization request. If a different office

has been selected, the user cannot assign the file to a new adjuster. The new office must now assign the file.

1.5 Post-Conditions

5 If the use case is successful, the system will change the request type from an unassigned authorization request to direct bill. If the user has authority to authorize this request, the system will change the request to Authorized status and assign the adjuster picked in Step 5 of the basic flow.

10 If the use case is unsuccessful, the system state will remain unchanged.

1.6 Special Requirements

None.

15 1.7 Extension Points

1.7.1 MA-04 Send Message

The Send Message function will be used to allow the user to capture messages and diary notes associated with a rental reservation/authorization. The USER can elect to have the message sent to the Enterprise rental branch location responsible for the reservation/authorization. The USER may also send a message without assigning the file to an adjuster/office. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

25

1.7.2 MA-10 Authorize a Request

The ADJUSTER may decide to enter into the full detail screen of the unassigned request, which would invoke the Authorize a Request case.

30 1.7.3 MA-17 Cancel Authorization

At any point prior to assigning the file to an ADJUSTER, the USER should have the ability to cancel the authorization. If the authorization is canceled, the ADJUSTER will be prompted to select a cancellation

reason code from a drop down list along with having the option to enter additional comments.

2. Screen Design

5 A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Action Items - Unassigned

10 This screen will allow the USER to assign action items to a claims office or an adjuster or the USER may cancel an item. The USER may also change specified information in the Customer File through this screen.

2.1.1 Screen Layout - Action Items - Unassigned - see Figure 116.

15

2.1.2 Action Items - Unassigned

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Claims Office	Output	3	Office Id	external organization abbreviated name	N/A.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	N/A.
	Output	30	Renter's Name	First Name + Last Name	This should be a link. The USER should be able to get to the authorize page from this screen field.
	Output	30	Renter's Address	Address Line	
	Output	10	Renter's City	City	
	Output	3	Renter's State	State	
	Output	10	Renter's Zip Code	Zip Code	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	If these fields are populated, add a label to the screen to differentiate between Home Phone and Work Phone.
	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	If these fields are populated, add a label to the screen to differentiate between Home Phone and Work Phone.
Claim Number	Input	30	Claim Number	Insurance Claim Number	N/A.
Vehicle Condition	List Box	15	Loss Type	loss type description	
Claim Type	List Box	15	Claim Type	claim type description	N/A.
Date of Loss:	Input	10	Date of Loss	Date of Loss	N/A.
Note to Enterprise	Input	30	Message Text	NOTE	N/A.
Assign to office:	List Box	5	Office Id	external organization abbreviated name	
Assign adjuster:	List Box	30	Adjuster Name	First Name + Last Name	Lists only those adjusters the USER has authority to assign.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

5

2.1.3.1 <<Previous

When clicked, the USER will be taken back to the previous screen.

2.1.3.2 Process

When clicked, the USER will be taken to the next item in the action item list or a detail of the completed action items. This button ends the use case.

2.1.3.3 Cancel

When clicked, the USER will be allowed to cancel the authorization. If this occurs, the rental becomes unauthorized and the rental is no longer the responsibility of the insurance company.

2.1.3.4 Last Action Message

After each action item in the USER's list has been completed, upon arriving at the next item there will be a confirmation message at the top of the screen. This message will be a hyperlink describing the last completed action. If the USER clicks on this link, the system will open the customer file, which will reflect all of the current information for the rental. The USER is then free to make additional changes or to simply view the file.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line

System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.2 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.3 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	Clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

5

4.1.4 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)

Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.
----------------------	---

4.1.5 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.6 DATE OF LOSS

Entity	A4 Cross Reference
Column Name	X4LSDT
Label Name	DATE OF LOSS
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

5

4.1.7 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.8 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.9 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies.

5

4.1.10 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	

Data Type	CHAR(15)
Attribute Definition	

4.1.11 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.12 handled by adjustor code

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

5

4.1.13 handled by company identifier

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

4.1.14 handling for adjustor code

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adjr_cde
Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.15 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier:
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

5

4.1.16 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.17 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.18 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.19 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.20 NOTE

Entity	ARM: ARMS/400 Diary Notes File
--------	--------------------------------

Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.21 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.22 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

5

4.1.23 Renters Night Phone Extension

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extension
System Name	
Data Type	NUMERIC(4)

Attribute Definition	
----------------------	--

4.1.23 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.24 Zip Code

Entity	ARM: Renter Detail
Column Name	RKZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5

5. Questions and Answers

Issue Number: 345

10 **Question:** Do we force the user to view the Rental Detail in order to change the unassigned adjuster to an adjuster who is authorized to handle?

Status: Closed - Resolved

15 **Resolution:** 4-12-00, Randy Haselhorst, we don't want to force them to look at the detail to assign a rental request to another user. They primarily look for claim number, claim type, renter name and possibly date of loss. If you can make the

option you've described intuitive, that may work, but it doesn't sound that way to me.

4-12-00, Kim De Vallance, NO - This is a great feature, but I don't know if it is necessary. Some companies use this feature, while others wait for the phone call to authorize.

Issue Number: 346

Question: Should you be allowed to decline, authorize or extend an unassigned rental.

Status: Closed - Resolved

Resolution: 4-12-00, Randy Haselhorst - you can't "extend" until you've authorized. Decline could be an option, but we should probably think about that more to determine if we should. Current state does not have this but I have heard people ask for it. As far as authorizing, that again may be a good idea. I'd like to see Kim and Dave's ideas.

4-12-00, Kim De Vallance- Yes, we have heard this many, many times that will assigning a rental, the user should have the ability to do all these things (as long as the user has the proper authority).

Issue Number: 361

Question: Can we pass along an unassigned to another office?

Status: Pending

Resolution: Yes, if the request is an unassigned status, the USER can transfer it to another office.

Issue Number: 378

Question: Can we Exit the use case after Sending a Message and leave the request unassigned? Iteration 2 question.

Status: Closed - Resolved

5

Resolution: 6-23-00 Per Brian Weingart, - yes, after sending a message on an unassigned request, if we didn't assign an adjuster, it is still unassigned.

Issue Number: 413

10

Question: 6-23-00, Only one person can handle un-assigns - which is set up in the profile? Or can a multiple # of people handle the un-assigns? Does the Handling for drop down box allow for the selection of unassigned? How do we handle record locking? Per Jennifer, Sean is working on this issue.

15

Status: Pending

Resolution:

20

Issue Number: 414

Question: 6-23-00, If I select Unassigned from the action item list and only one exists do I go straight to the detail? Per Jennifer - Sean is working on this issue.

25

Status: Pending

Resolution:

Issue Number: 415

30

Question: 6-23-00, If I select Unassigned from the action item list and multiple exists I go straight to the detail. I go to a screen, which looks like action items, but list all of the unassigned. Per Jennifer - Sean is working on this issue.

Status: Pending

Resolution:

5

Functional Design Specification

Authorize a Request

10 **Version 1.1**

Authorize a Request

1. Authorize Request Use Case

15

1.1 Brief Description

This use case describes how a USER authorizes a direct bill request.

1.2 Use Case Actors

20

The following actors will interact with this use case:

- **ADJUSTER** – The USER will use this system to authorize a direct bill request.

1.3 Pre-Conditions

25

- The USER must be logged into the ARMS Web system.
- The USER must have the authority to authorize a request.
- At least one outstanding unauthorized direct bill request must be assigned that the USER may handle.
- The USER must have selected an Unauthorized Direct Bill Request from the Review Action Items Screen or from the Search Results page.

30

1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to “Authorize Request”.

1.4.1 Activity Diagram – see Figure 117.

5

1.4.2 Basic Flow

1. The USER selects an outstanding direct bill to authorize.
2. The system displays the Customer file.
3. The USER reviews the renter's information.
- 10 4. The USER inputs a number of Authorized Amounts, days and required fields.
5. The USER submits the Authorization.
6. The system validates information in the Customer File.
7. If the adjuster assigned to the Customer File is 'UNKNOWN' or
15 'UNASSIGNED', the System will assign the Customer File to the current USER.
8. The system will update the ARMS/Web database with the Authorization.
9. The System reads the user profile to see if the confirmation page
20 should display.
10. If the profile indicates 'Show Confirmation Page', the System will display the confirmation page.
11. This ends the use case.

25

1.4.3 Alternative Flows

1.4.3.1 View Notebook

- At step 3 of the Basic Flow, the USER can select to view the transaction history (Notebook) by selecting the Go To Notebook
30 link.

1.4.3.2 Add Notes to Customer File

At step 3 of the Basic Flow, the USER can add notes to the Customer File by typing in the appropriate notes field on the Customer File page.

5 1.4.3.3 *Skip Customer File*

At step 3 of the Basic Flow, the USER should have the ability to skip to the next action item by clicking the Skip button. After clicking the Skip button, the USER should be taken to the next action item on their current list without any changes to the file being skipped.

10 1.4.3.4 *Change Customer File*

At step 3 of the Basic Flow, the adjuster can make changes to the additional details of the Customer File. This is done by selecting the Add / Change link which will invoke an editable page with all *appropriate information editable.

1.5 **Post-Conditions**

- 20 • If the use case was successful then the changes should go into effect immediately and the screen should revert back to the original screen of entry.
- If the use case was successful, then the ARMS system will be notified of authorization changes.
- 25 • If the use case was unsuccessful then the system state will be unchanged.

1.6 **Special Requirements**

30 1.6.1 *Requirements for Claim Type Authorizations*

The following are a set of requirements surrounding the type of authorized amounts that are allowable based on the Claim Type associated with a rental. These restrictions **DO NOT APPLY** to

reservations that are submitted with a Direct Billing Percentage of zero (0).

1.6.1.1 When the Claim Type selected is 'Insured', 'Theft', or 'Uninsured Motorist'

1.6.1.1.1 The reservation/rental must always include an Authorized Rate or both Policy Daily **and** Maximum Limits as defined by the renter's insurance policy. Zero (0) is an acceptable Policy Daily Limit.

1.6.1.1.2 The reservation/rental must include an Authorized Rate or Policy Daily Limit if a Policy Maximum Limit is included. Zero (0) is an acceptable Policy Daily Limit.

1.6.1.2 When the Claim Type selected is 'Claimant'

1.6.1.2.1 The reservation/rental must always include an Authorized Rate.

1.6.1.2.2 The reservation/rental may not include a Policy Daily/Maximum Limits selection.

1.6.1.3 Requirements for editable fields based on reservation / ticket status

1.6.1.3.1 Depending on the status of the Customer File the adjuster may change the following fields:

Field Name	Unassigned/ Unauthorized Reservation/ Ticket	Assigned but Unauthorized Reservation or Ticket	Authorized Ticket
CLAIM NUMBER	X	X	X
CLAIM TYPE	X	X	X

Field Name	Unassigned/ Unauthorized Reservation/ Ticket	Assigned but Unauthorized Reservation or Ticket	Authorized Ticket
LOSS TYPE	X	X	X
DATE OF LOSS	X	X	X
INSURED INFORMATION	X	X	X
RENTER INFORMATION	X		
DATE RENTAL IS NEEDED	X		
ADDITIONAL CHARGES	X	X	X
NUMBER OF AUTHORIZED DAYS	X	X	
BILL-TO PERCENT	X	X	X
POLICY LIMITS	X	X	X
AUTHORIZED RATE	X	X	X

If the Customer File is an Unauthorized Reservation, the adjuster can Reject the Authorization Request, Send a Message, and/or Transfer (Assign) the file to an adjuster.

5

1.6.1.3.2 If the status of the Customer File is an open ticket the following rules apply:

Actions	Authorized Reservation	Unauthorized Reservation / Ticket	Authorized Open Ticket
Send Message	X	X	X
Extension			X
Terminate Rental			X
Cancel Authorization	X	X	
Transfer/Assign Adjuster	X	X	X
View Car Class	X	X	X

1.7 Extension Points

10

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.7.1 MA-04 Send Message

The Send Message will be used to allow the USER to capture messages and diary notes associated with a rental reservation/authorization. The USER can elect to either have the message sent to the Enterprise rental branch location responsible for the reservation/authorization, or to store the note in the ARMS Web system without sending the message to Enterprise. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

1.7.2 MA-16 Transfer Work

(The Change Adjuster button invokes this use case).

The ADJUSTER may choose to transfer an authorization to a different adjuster in his/her office or transfer the authorization to another adjuster in a different office.

1.7.3 MA-08 View Car Class

The ADJUSTER may choose to view the car class. This button invokes the View Car Class use case.

1.7.4 MA-17 Cancel Authorization

The ADJUSTER may choose to deny the authorization. When the ADJUSTER selects the CANCEL button, it will invoke the Cancel Authorization use case to reject the authorization.

2. **Screen Design**

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 **Authorize Rental Detail**

This screen will allow the user to work the currently selected authorization request. The user may set the authorization amounts and policy coverage limits or may assign the request to another adjuster.

5 2.1.1 *Screen Layout - Authorize Rental Detail* - see Figure 118.

2.1.2 *Authorize Rental Detail*

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Handling For:	List Box	30	Handling for Adjuster's Name	First Name + Last Name	N/A.
Note to Enterprise:	Input	0	Message	NOTE	
Notebook	Output	50	Message	NOTE	
Note to Self Only	Input	0	Message	NOTE	
	Output	8	Message Creation Date	Add Date	N/A.
Message	Output	50	Message Text	NOTE	N/A.
	Output	10	Notebook creation date	Add Date	
Claim no.	Output	30	Claim Number	Insurance Claim Number	
Claim Number:	Input	11	Claim Number	Insurance Claim Number	N/A.
___ days @	Input	4	Number of Days Authorized	Number Of Days Authorized	N/A.
Direct Bill %:	Input	6	Percent Covered	Bill To %	N/A.
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Dollars Per Day Covered	N/A.
Policy: Daily rate/Maximum dollars:	List Box	5	Policy Maximum and Daily Rates	Max \$ Covered	N/A.
	Output	30	Rental Location Branch Name	Rental Location	N/A.
Date Rental Needed:	List Box	10	Rental Start Date	Start Date	N/A.
days @ ___	List Box	6	Vehicle Rate	Vehicle Rate	N/A.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Insured Name:	Input	30	Insured's Name	First Name + Last Name	N/A.
Insured Name:	Output	20	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	List Box	10	Date of Loss	Date of Loss	N/A.
Date of Loss	Output	10	Date of Loss	Date of Loss	
	Output	30	Renter's Address Line	Address Line	
Renter's Address	Output	20	Renter's City	City	
	Output	3	Renter's State/Province Code	State	
	Output	15	Renter's Zip/Postal Code	Zip Code	
Home Phone:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	This field is input if the ticket is not opened. It will not be editable if the ticket is open.
Authorize Direct Bill: for	Output	30	Renter's Name	First Name + Last Name	N/A.
Renter:	Output	30	Renter's Name	First Name + Last Name	N/A.
	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	
Owner's Vehicle	Output	20	Vehicle Year, Make and Model	Renter Vehicle Year + Renter Make/Model	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	15	Repair Facility City	City	
Repair Facility	Output	20	Repair Facility Name	Repair Facility Name	
	Output	3	Repair Facility State	State	
	Output	10	Repair Facility Telephone Number	Telephone Number	
	Output	7	Repair Facility Zip Code	Zip Code	
Claim Type:	List Box	15	Claim Type	claim type description	N/A.
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Vehicle Condition	List Box	20	Loss Type	loss type description	
Vehicle Condition	Output	20	Type of Loss	loss type description	
	Input	20	Renter's Email	renter email	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Skip

When clicked, the USER will be taken out of the use case without changing the current status of the request. Any changes made by clicking Change or Add and keying data in the bottom section will be saved.

2.1.3.2 Process

When clicked, the system will validate the input and accept the changes made to the customer file. The arms database will be updated and the data will be sent to the arms system. The use

case will then end and the USER will return to the process from which they came.

2.1.3.3 Notebook

5 When clicked, the USER will be taken to the Note Book section at the bottom of the screen to view all messages for this rental.

2.1.3.4 Transfer File

10 When clicked, the USER will be taken to the Transfer File screen. This screen allows the USER to change the office or adjuster currently assigned to the customer file. The required information in the Extend Rental/Customer File will be passed to the Transfer File screen. Upon completion of the transfer, the USER will then be returned to the next action item or the profiled start page, depending on the screen from which the USER began.

15

2.1.3.5 Change or Add

20 When clicked, the system will refresh the current screen and make all editable fields in the bottom section (outside the gray box area) input capable. The changes on the top of the screen will not be lost.

2.1.3.6 Top of page

25 When clicked, the USER will be taken to the top of the current page.

2.1.3.7 View Car Class

30 When clicked, the USER will be taken to the View Car Class Use Case. No changes will be lost. Once the USER is finished with this use case, the USER will return to the Extend Rental Use Case.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

- 5 This section includes a definition of all data fields included in the functional specification.

4.1.1 Add Date

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEADDT
Label Name	Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

10 4.1.2 Address Line

Entity	ARM: Renter Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line
System Name	
Data Type	CHAR(30)

Attribute Definition	
----------------------	--

4.1.4 Address Line2

Entity	ARM: Renter Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.5 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

5

4.1.6 Branch

Entity	A4 Cross Reference
Column Name	br_id
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.7 City

Entity	ARM: Rental Location Master
--------	-----------------------------

Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.8 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.9 City

Entity	ARM: Repair Detail
Column Name	RUCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.10 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPCDE
Data Type	DEC(3,0)

Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.
----------------------	---

4.1.11 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.12 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

5

4.1.13 Date of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)

Attribute Definition	
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4.1.14 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.15 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

5

4.1.16 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.17 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	E OID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies.

4.1.18 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.19 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.20 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.21 Group

Entity	A4 Cross Reference
Column Name	grp_id
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.22 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.23 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name

System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.24 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.25 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.26 loss type code

Entity	AUTHORIZATION EXTENSION
Column Name	loss_typ_cde
Label Name	loss type code:
System Name	LOSSTYPCDE
Data Type	DEC(3,0)

Attribute Definition	The loss type code defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.
----------------------	--

4.1.27 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.28 Max \$ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$MAX
Label Name	Max \$ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

5

4.1.29 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)

Attribute Definition	
----------------------	--

4.1.30 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.31 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNLC
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

5

4.1.32 renter email

Entity	RENTER EXTENSION
Column Name	rentr_eml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.33 Renter Make/Model

Entity	ARM: Renter Detail
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Column Name	RKVHMM
Label Name	Renter Make/Model
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.34 Renter Vehicle Year

Entity	ARM: Renter Detail
Column Name	RKVHYR
Label Name	Renter Vehicle Year
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.35 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

5

4.1.36 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)

Attribute Definition	
----------------------	--

4.1.37 Renters Night Phone Extension

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.38 Repair Facility Name

Entity	ARM: Repair Detail
Column Name	RURFNM
Label Name	Repair Facility Name
System Name	
Data Type	CHAR(35)
Attribute Definition	

5

4.1.39 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.40 State

Entity	ARM: Rental Location Master
--------	-----------------------------

Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.41 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.42 State

Entity	ARM: Repair Detail
Column Name	RUSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.43 Status Description

Entity	ARM: ARMS/400 Cross Reference Status Table File
Column Name	XUSTDS
Label Name	Status Description
System Name	
Data Type	CHAR(6)

Attribute Definition	
----------------------	--

4.1.44 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.45 Telephone Number

Entity	ARM: Repair Detail
Column Name	RUPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

5

4.1.46 Vehicle Class

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHCS
Label Name	Vehicle Class
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.47 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
--------	--------------------------------

Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.48 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.49 Zip Code

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5

5. Questions and Answers

Issue Number: 419

10

Question: 6-23-00, When rejecting an authorization do we want a reason code?
Per Jennifer - Mike, Brad and Craig is handling this.

Status: Pending

Resolution: 07-03-00 - Brad Reel: In the ARMS Web V2.0 application reason codes will be collected for the following events: reject invoice, terminate authorization. Per a discussion with Randy Haselhorst, it would be worthwhile to collect a reason code for reject/cancel authorization. However, it is not critical for this release. If possible it should be incorporated.

07-03-00 - Brad Reel: I am reassigning to Mike Slater to work with Neil Fitzgerald and determine whether or not to incorporate in V2.0, or wait until a later release.

Functional Design Specification

Change Customer File

Version 1.1

Change Customer File

1. Change Customer File Use Case

1.1 Brief Description

The Change Authorization use case describes how the USER could change an authorization assigned to a reservation nor an open rental.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will use this case to add or change information related to an existing Customer File on a rental within ARMS Web.

1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.
- The USER must have selected to change an existing Customer File.

1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes to a Customer File.

5 *1.4.1 Activity Diagram* – see Figure 119.

1.4.2 Basic Flow

1. The USER will select a Customer File to change.
2. The SYSTEM will display the associated Customer File detail of
10 the selected item.
3. The USER will add additional or modify existing information
associated with the Customer File.
4. The SYSTEM will validate added or modified data.
5. The SYSTEM will update ARMS Web to reflect the changes.
- 15 6. The SYSTEM notifies ARMS of the changes associated with the
Customer File.
7. The SYSTEM checks the profile for the confirmation screen
setting.
8. This ends the use case.

20

1.4.3 Alternative Flows

1.4.3.1 View Rental Notebook

At step 1, the USER may choose to view the history of a rental.
25 The USER will be able to see the last five diary notes. The USER
can also select to view the transaction history or add diary notes
from the Extend Rental Detail.

1.4.3.2 Validate Changes

30 If the USER changes or adds information, which does not pass
validation, an error message will notify the USER and return them
to step 1 of the Basic Flow.

5 If an error is discovered in the validation of the reservation / rental information submitted by the USER (Step 3 of the **Basic Flow**), the system would present the USER with an error message and return them to the Detailed Reservation / Rental Display. If the error is specific to a data field within the form, the field should be highlighted and the error described.

1.4.3.3 *Display Confirmation*

10 After step 6, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional; therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 *Update USER Profile*

15 During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

20

1.5 **Post-Conditions**

- If the use case was successful then the changes have been saved to the ARMS Web database and if appropriate, ARMS Web has generated notification transactions to ARMS.
- 25 • If the use case was unsuccessful then the system has remained unchanged.

1.6 **Special Requirements**

- 30 • It will be considered invalid if for a reservation, the Claim Number, Renter First Name, Renter Last Name, Claim Type, Vehicle Condition, Rental Location, Authorized Number of Days, Direct Bill Percent, and at least one Renter Telephone number have not been included.

- It will be considered invalid if the customer has established Claim Number editing and the Claim Number format does not meet the requirements of the customer's Claim Number definition.
- 5 • It will be considered invalid if any field identified as REQUIRED in the company/office profile is not included.
- It will be considered invalid if any data entered violates the data type as specified by the ARMS Web database (i.e., alpha characters in a numeric field).
- 10 • A warning will be presented to the USER if any defined limits identified in the company/office/user profile are exceeded (e.g., Maximum Number of Days Authorized). The system will allow the USER to submit the authorization from the warning.
- 15 • It will be considered invalid if the selected Claim Type is 'Insured,' or 'Theft' and the reservation does not include an Authorized Rate or does not include both Policy Daily and Policy Maximum Limits (with the exception of reservations with a Direct Bill Percent of zero (0)). A Policy Daily Limit of zero (0) is an acceptable entry.
- 20 • It will be considered invalid if the selected Claim Type is 'Insured,' or 'Theft' and the reservation includes a Policy Maximum Limit but does not include an Authorized Rate or Policy Daily Limit (with the exception of reservations with a Direct Bill Percent of zero (0)). A Policy Daily Limit of zero (0) is an acceptable entry.
- 25 • It will be considered invalid if the selected Claim Type is 'Claimant' and Policy Limits (Daily or Maximum) have been included.
- It will be considered invalid if the Authorized Number of Days is included and is less than zero (0).
- It will be considered invalid if the Direct Bill Percent is greater than zero (0) and the Authorized Number of Days is zero.
- It will be considered invalid if the Direct Bill Percent is less than zero (0).
- 30 • It will be considered invalid if the Direct Bill Percent is greater than one hundred (100).
- It will be considered invalid if the Labor Hours are less than zero (0).

- It will be considered invalid if the Date of Loss is greater than the current date.
- It will be considered invalid if the first three digits (i.e., area code) of any U.S. or Canadian telephone number meet the criteria below:

- 5
- 0XX
 - 1XX
 - the second and third digits equal (e.g., 800, 877, 888, etc.)

Where X equals any digit 0 through 9.

- 10
- It will be considered invalid if a U.S. or Canadian telephone number does not consist of 10 digits.
 - It will be considered invalid if a U.S. postal code that does not consist of 5 or 9 digits.
 - It will be considered invalid if the a Canadian postal code does not consist of 6 alphanumeric characters in the format AXAXAX where A is an alpha character and X is a digit between 0 and 9.
- 15
- It will be considered invalid if an E-mail address is included that does not include an '@' character.
 - It will be considered invalid if the Send e-mail Confirmation to Renter flag is set to true and the Renter e-mail address is not included.
- 20
- If the customer file is in reservation status, the screen will show a cancel button for the USER to cancel the authorization if desired.
 - If the customer file is in open ticket status, the screen will show the set last day button for the USER to terminate the rental if desired.

25

1.7 Extension Points

1.7.1 MA-04 Send a Message

30

The Send Message will be used to allow the USER to capture messages and diary notes associated with extending a rental. The USER can elect to either have the message sent to the Enterprise rental branch location responsible for the reservation/authorization, or to store the note in the

ARMS Web system without sending the message to Enterprise. All MESSAGES and DIARY NOTES captured must be related to a specific reservation/authorization.

5 1.7.2 *MA-16 Reassign USER or Office (The Transfer File button invokes this use case)*

After the extend rental detail is displayed, the USER may choose to change the current office/USER. First, the USER would select to change the current office/USER. Second, the system would display a list of
10 authorized offices/USERS. Third, the USER would select a new office/USER.

1.7.3 *MA-15 Terminate a Rental (Set Last Day)*

After the extend rental detail is displayed, the USER may choose to
15 terminate the rental. If termination is selected, the USER must enter a reason for the termination of the rental. Termination means the insurance company is no longer willing to pay for the rental. This function (button) is only available for an open ticket. For reservation status, the USER should see the Cancel button.

20

1.7.4 *MA-17 Cancel Authorization*

Before step 5 of the Basic Flow, the USER should have the capability to cancel the authorization. Before the USER has made changes that have been updated in the database and sent to ARMS, the Cancel
25 Authorization function (button) should be available for reservation status. However, the USER cannot perform the Cancel function on an open ticket. For an open ticket, the Termination (Set Last Day) function (button) is available.

30 1.7.5 *MA-08 View Car Class*

The View Car Class use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will include the average number of passengers and luggage items that can be

served by a vehicle in the specific car class. The car class selected by the USER should be applied to the reservation.

2. Screen Design

- 5 A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Change Rental Detail

- 10 This screen (see Figures 120(a) and (b)) will allow the USER to work the currently selected authorization request. The USER may set the authorization amounts and policy coverage limits or may assign the request to another adjuster.

- 15 2.1.1 *Screen Layout - Change Rental Detail* - see Figures 120(a) and (b)

2.1.2 *Change Rental Detail*

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Additional Charges	Output	15	Additional Charges		
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Last Name + First Name
Note to Self Only	Input	50	Message	NOTE	
Messages:	Output	8	Message Creation Date	Add Date	N/A.
Note to Enterprise:	Input	50	Message Text	NOTE	N/A.
	Output	50	Message Text	NOTE	N/A.
Claim Number:	Output	11	Claim Number	Insurance Claim Number	
Days Authorized to Date:	Output	2	Number of Days Authorized	Number Of Days Authorized	N/A.

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
____ additional authorized days	Output	2	Number of Days to Extend	Number of Days to Extend	
Policy Limits	List Box	5	Policy Maximum and Dollars per day	Max \$ Covered + Dollars Per Day Covered	
	Output	30	Rental Location Branch Name	Rental Location	
days @:	List Box	6	Rental Location Rate	Vehicle Rate	N/A.
Date of Rental	Output	10	Rental Start Date	Start Date	N/A.
Insured Name:	Output	30	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	Output	10	Date of Loss	Date of Loss	
	Output	20	Renter City Name	City	
	Output	10	Rental Postal / Zip Code	Zip Code	
	Output	3	Renter State / Province Code	State	
	Output	30	Renter Street Address	Address Line	
Home:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	Not editable if ticket is Open.

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
	Output	30	Renter's Name	First Name + Last Name	Will not be editable if ticket is open. First Name + Last Name
Renter Information:	Output	30	Renter's Name	First Name + Last Name	N/A.
Work Phone:	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	Will not be able to edit if ticket is Open.
Owner's vehicle:	Output	4	Vehicle Year, Make and Model	Renter Make/Model + Renter Vehicle Year	
Repair Facility:	Output	20	Body Shop Name	Repair Facility Name	
	Input	16	Body Shop Phone Number	Telephone Number	
	Output	15	Repair Facility City	City	
	Output	3	Repair Facility State	State	
	Output	7	Repair Facility zip code	Zip Code	
Last Day authorized	Output	10	Date rental is authorized through	CALCULATED	Calculated field. Populated with an Open Ticket only.
Charges to Date:	Output	10	Total Charges	CALCULATED	
Renter Type	Output	10	Claim type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	N/A.
Vehicle Condition	Output	15	Type of Loss	loss type description	
Renter Email:	Output	20	Renter's Email	renter email	Will not be able to edit if ticket is Open.

2.1.3 *Screen Function Definition*

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

5

2.1.3.1 *Skip*

When clicked, the USER will be taken out of the use case without changing the current status of the request. Any changes made by clicking Change or Add and keying data in the bottom section will be saved.

10

2.1.3.2 *Process*

When clicked, the system will validate the input and accept the changes made to the customer file. The arms web database will be updated and the data will be sent to the arms system. The use case will then end and the USER will return to the process from which they came.

15

2.1.3.3 *Notebook*

When clicked, the USER will be taken to the Note Book section at the bottom of the screen to view all messages for this rental.

20

2.1.3.4 *Set Last Day*

When clicked, the system will terminate the rental. The USER will be prompted to enter a termination date for this rental. This coincides with the use case MA-15-Terminate Rental.

25

2.1.3.5 *Transfer File*

When clicked, the USER will be taken to the Transfer File screen. This screen allows the USER to change the office or adjuster currently assigned to the customer file. The required information in the Extend Rental/Customer File will be passed to the Transfer File screen. Upon completion of the transfer, the USER will then

30

be returned to the next action item or the profiled start page, depending on the screen from which the USER began.

2.1.3.6 Change or Add

5 When clicked, the system will refresh the current screen and make all editable fields in the bottom section (outside the gray box area) input capable. The changes on the top of the screen will not be lost.

2.1.3.7 Top of page

10 When clicked, the USER will be taken to the top of the current page.

2.1.3.8 View Car Class

15 When clicked, the USER will be taken to the View Car Class Use Case. No changes will be lost. Once the USER is finished with this use case, the USER will return to the Extend Rental Use Case.

2.1.3.9 Extend Rental (checkbox)

20 When clicked and the process button is clicked, the system will validate the input and accept the extension AND any other changes made to the customer file. The arms web database will be updated and the data will be sent to the arms system. The use
25 case will then end and the USER will proceed to the next action item. (If unchecked and the process button is clicked, only the changes to the screen will be saved. The extension will NOT be executed.)

2.1.3.10 Last Action Message

30 After each action item in the USER's list has been completed, upon arriving at the next item there will be a confirmation message at the top of the screen. This message will be a hyperlink

describing the last completed action. If the USER clicks on this link, the system will open the customer file, which will reflect all of the current information for the rental. The USER is then free to make additional changes or to simply view the file.

5

3. Application Operations

4. Data Fields

10 4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 Add Date

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEADDT
Label Name	Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

15

4.1.2 Address Line

Entity	ARM: Renter Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.5 Branch

Entity	ARM: Rental Location Master
Column Name	Branch
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.6 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	

Data Type	CHAR(20)
Attribute Definition	

4.1.7 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.8 City

Entity	ARM: Repair Detail
Column Name	RUCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.9 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPECODE
Data Type	DEC(3,0)
Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.10 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.11 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

5

4.1.12 Date of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.13 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.14 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

5

4.1.15 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	E OID
Data Type	DEC(11,0)

Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies.
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4.1.16 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.17 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.18 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.19 Group

Entity	ARM: Rental Location Master
Column Name	Group
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.20 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.21 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.22 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM

Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.23 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.24 loss type code

Entity	AUTHORIZATION EXTENSION
Column Name	loss_typ_cde
Label Name	loss type code:
System Name	LOSSTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The loss type code defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

5

4.1.25 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC

Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.26 message ecars indicator

Entity	AUTHORIZATION MESSAGE
Column Name	msg_ecars_ind
Label Name	message ecars indicator:
System Name	MSGECARIND
Data Type	CHAR(1)
Attribute Definition	The message ecars indicator indicates whether the message is sent/received from the ecars system.

4.1.27 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

5

4.1.28 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)

Attribute Definition	
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4.1.29 Rate Charged

Entity	ARM: Authorization(Claim Info)
Column Name	AZRTCH
Label Name	Rate Charged
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.30 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNLC
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

5

4.1.31 renter email

Entity	RENTER EXTENSION
Column Name	rentr_eml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.32 Renter Make/Model

Entity	ARM: Renter Detail
--------	--------------------

Column Name	RKVHMM
Label Name	Renter Make/Model
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.33 Renter Vehicle Year

Entity	ARM: Renter Detail
Column Name	RKVHYR
Label Name	Renter Vehicle Year
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.34 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

5

4.1.35 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)

Attribute Definition	
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4.1.36 Renters Night Phone Extension

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters Night Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.37 Repair Facility Name

Entity	ARM: Repair Detail
Column Name	RURFNM
Label Name	Repair Facility Name
System Name	
Data Type	CHAR(35)
Attribute Definition	

5

4.1.38 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.39 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.40 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.41 State

Entity	ARM: Renter Detail
Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.42 State

Entity	ARM: Repair Detail
Column Name	RUSACD

Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.43 Status Description

Entity	ARM: ARMS/400 Cross Reference Status Table File
Column Name	XUSTDS
Label Name	Status Description
System Name	
Data Type	CHAR(6)
Attribute Definition	

4.1.44 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

5

4.1.45 Telephone Number

Entity	ARM: Repair Detail
Column Name	RUPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.46 Vehicle Class

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHCS
Label Name	Vehicle Class
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.47 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

5

4.1.48 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.49 Zip Code

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code

System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.50 Zip Code

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5. Questions and Answers

5

Issue Number: 368

Question: Can the Adjuster shorten the number of days authorized without terminating the rental.

10

Status: Closed - Resolved

Resolution: 5-3-00, Brian Weingart, Kim De Vallance - No. After a ticket is open and has been authorized, the only modification allowed to the number of days authorized comes in the form of a termination. For example, if an adjuster sent us ten days and on the fifth day, decided to only give us a total of six (thereby removing the authorization for four days) the adjuster would have to terminate that rental as of the sixth day.

15

20

Issue Number: 386

Question: Should the Date of Loss be editable in Change Authorization or does it depend on the state of the reservation/ticket.

Status: Closed - Resolved

Resolution: 6-23-00, Brian Weingart, - Since Date of Loss is considered Insurance company information, the adjuster owns this information. The Adjuster can change this in either a reservation or open ticket status. This is editable until the rental is considered closed.

Functional Design Specification

Terminate Rental

Version 1.0

Terminate Rental

1. Terminate Rental Use Case

1.1 Brief Description

The Terminate Rental use case describes how the USER would terminate a rental. This use case will allow the USER to inform Enterprise of the last day that the ADJUSTER will pay for a rental. In most cases, by providing a date in the future, Enterprise will receive an extension through the last day.

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will use this case to terminate a rental.

1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.
- The USER must have the authority to terminate an open rental.

- The USER must have selected an authorized rental.

1.4 Flow of Events

The Flow of Events will include the necessary steps to terminate a rental.

5

14.1 Activity Diagram – see Figure 121.

14.2 Basic Flow

1. The USER selects to terminate an authorization.
- 10 2. The system prompts the USER for the termination information.
3. The USER enters the termination date and reason/comments.
4. The USER submits the termination information.
5. The system will validate the termination information.
6. The system updates the ARMS Web database.
- 15 7. The system reads the USER profile for the confirmation settings.
8. This ends the use case.

1.4.3 Alternative Flows

20

1.4.3.1 Previous

After step 3, the USER can abandon all changes, which result in the system state remaining unchanged. After clicking the “Previous” button, the USER will be returned to the screen from which they came.

25

1.4.3.2 Additional Comments

30

When terminating a rental, the USER must select a reason from the drop-down box to explain why the termination is taking place. As well, if further explanation is desired there is a comment box in which the USER may enter additional comments for more clarification. This section is optional, unless the USER selects “Other” from the reason code drop-down box. In this case, the comment box must be used.

1.4.3.3 Display Confirmation

After step 7, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place.

5 The confirmation page is completely optional; therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

10 During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

15 1.5 Post-Conditions

- If the use case was successful then the changes will go into effect immediately and write a transaction record to pass to ARMS indicating that there was a change on the rental. If the renter's email address was entered, a system-generated message will notify the renter.
- 20 • If the use case was unsuccessful then the system will remain unchanged.

1.6 Special Requirements

1.6.1 The termination date must be greater than or equal to the current date or the last day authorized. There is a business rule that ensures that an adjuster cannot take away already used rental days.

25

Current Date	Authorization Date	Termination Date
6/20	6/25	$\geq 6/20$
6/20	6/10	$\geq 6/10$

30

1.6.2 If the USER extends an authorization that has been terminated, the termination information is considered invalid.

- 1.6.3 It is mandatory that a USER select a termination reason from the drop-down list. If the USER selects “Other” from the drop-down list, a comment about the termination must be supplied.

5

1.7 Extension Points

None.

2. Screen Design

10

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Terminate Rental

15

This screen (see Figure 122) will allow the user enter the information about terminating a rental.

2.1.1 Screen Layout – Terminate Rental - see Figure 122

20

2.1.2 Terminate Rental

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Comment:	Input	50	Message Text	NOTE	Required field if Reason selected is “other”
Reason:	List Box	30	Reason	NOTE	Required Field

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Termination Date	List Box	10	Termination Date	Termination Date	The date entered must be the current date or later. This is the date that the insurance company will no longer pay for the rental. / This field should have a calendar control associated with it to allow the user to select the date of loss from a calend.
Renter:	Output	30	Renter's Name	First Name + Last Name	Renter's Last Name + Renter's First Name

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Previous

Will return the user to the detail screen from which they came.

The system and the information on the detail screen will remain unchanged.

2.1.3.2 Process

When clicked, the system will complete the termination of the rental and notify the required parties.

2.1.3.2.1 The user must have selected a valid termination date that is greater than the current date.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

5

4.1.1 *Company Id*

Entity	ARM: ARMS/400 Internal Error Log File
Column Name	E4CUID
Label Name	Company Id
System Name	
Data Type	CHAR(5)
Attribute Definition	

4.1.2 *external organization abbreviated name*

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

10

4.1.3 *external organization identifier*

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID

Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies.

4.1.4 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.5 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.6 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)

Attribute Definition	
----------------------	--

4.1.7 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.8 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.9 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.10 renter email

Entity	RENTER EXTENSION
--------	------------------

Column Name	rentr_emi
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.11 Termination Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZTMDT
Label Name	Termination Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

5. Questions and Answers

5

Issue Number: 373

Question: How is the renter currently notified of a termination of the rental? Are they usually notified by the time the rental is terminated? How should this be represented on the screen? Should the checkbox say to notify the renter or that the renter has already been notified?

10

Status: Pending

15

Resolution:

Functional Design Specification

Transfer File

20

Version 0.6

Transfer File

1. Transfer File Use Case

5

1.1 Brief Description

The Transfer File use case describes how the user would assign one of their action items to another user/office.

10 1.2 Use Case Actors

The following actors will interact with this use case. Each of the actors can be defined generically as USER. The USER will use this use case to reassign action items to other USERS and/or offices.

- **ADJUSTER**
- 15 • **PROCESSOR**

1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.
- The USER must have the ability to reassign action items.
- 20 • The USER must have access to a customer file to reassign.
- The customer file must be in an open, reservation, or unauthorized state.

1.4 Flow of Events

25 The Flow of Events will include the necessary steps for a USER to reassign action items.

1.4.1 Activity Diagram – see Figure 123.

1.4.2 Basic Flow

- 30 1. The USER selects to reassign a customer file.
2. The system retrieves the list of valid offices to display.

3. The system retrieves the list of valid USERS to display based on reservation/ticket status.
4. The system displays the list of adjusters for the current office and the list of other valid offices.
5. The USER selects the user that will be the new owner of the selected action item.
6. The system will update the ARMS Web database to reflect the recent ownership change and changes, if any, from the prior screen.
7. The system generates a message indicating that a transfer and any other changes have been completed.
8. The system updates the ARMS Web database and notifies ARMS with an Authorization Change transaction.
9. This ends the use case.

1.4.3 *Alternative Flows*

1.4.3.1 *Change Office*

After step 3 of the basic flow, the USER may choose to assign the action item to a new office. If the USER chooses a new office, the flow would return to step 2 of the basic flow. This should reflect possible recipients of the action item from that office.

1.4.3.2 *Cancel Use Case*

The USER may cancel the use case at any point prior to updating the ARMS Web Database. If the USER elects to cancel the use case, the customer file will not be transferred, however, any other changes that were made to the file will remain.

1.4.3.3 *Display Confirmation*

After step 7, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place. The confirmation page is completely optional, therefore, at

anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

5 During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

10 1.5 Post-Conditions

- If the use case was successful then the changes should go in to effect immediately and the new owner should be able to view the newly assigned action item.
- If the use case was unsuccessful then the system will remain unchanged.

15

1.6 Special Requirements

- When building the list of valid USERS, the system will determine the status of the reservation / ticket and retrieve all users in the current office with authority to process that status of a reservation / ticket.
- 20 • When building the list of valid Offices, the system will retrieve all other offices defined within ARMS Web as valid offices for the specified company.
- When selecting an office for the reassign operation, the system must rebuild the user list so the USER will only see valid users that are able to complete the action item to be transferred.
- 25 • After the changes have been submitted, the next Action Item will populate indicating that a transfer has been completed, if the USER started from the Action Item List.
- After the changes have been submitted, the USER will return to the profiled start page with a message indicating that a transfer has been completed, if the USER arrived at the customer file via the search option.
- 30

1.7 Extension Points

None.

2. Screen Design

- 5 A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Transfer File

- 10 This screen (see Figure 124) will allow the USER to pick which functions that they may want to change.

2.1.1 Screen Layout - Transfer File - see Figure 124

- 15 2.1.2 Transfer File

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Adjuster's Name	ListBox	30	Change to Adjuster's Name	First Name + Last Name	List of adjuster's within the currently selected Assign to Claim Office that are authorized to handle the current request type. The adjuster that the request is currently assigned to will be selected upon entry into the screen.
Adjuster's Name:	Output	30	Current Adjuster's Name	First Name + Last Name	N/A.

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Claims Office	ListBox	3	Change to Office Id	external organization identifier	List of office within the current Company Structure that are authorized to handle the current request type. The office that the request is currently assigned to will be selected in the drop down box upon entry into the screen.
Claims Office:	Output	3	Current Office Id	external organization abbreviated name	N/A

2.1.3 Screen Function Definition

2.1.3.1 Cancel

5 When clicked, the USER will be returned to the screen/use case where they were prior to selecting Change Office/Adjuster (Transfer). Any changes made will be lost and the system will remain unchanged.

2.1.3.2 Process

10 When clicked, the system will be validated. If the validation passes, the update will be sent to the ARMS system and the USER will be returned to the screen/use case from which they came. If the validation fails, the USER will be returned to the

15 current screen with error message(s) and the field in error highlighted.

3. Application Operations

20 4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

5 4.1.1 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.2 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies.

4.1.3 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM

Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.4 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

Functional Design Specification

5 Cancel Authorization

Version 1.0

Cancel Authorization

10

1. Cancel Authorization Use Case

1.1 Brief Description

This use case will describe how a USER would cancel an authorized reservation.

15

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The USER will be able to perform the duties of canceling an authorized reservation.

20

1.3 Pre-Conditions

- The USER must be logged into the ARMS Web system.

- The USER must have the ability to cancel an authorization.
- The USER has selected an authorized reservation and wants to cancel the authorization within ARMS Web.

5 1.4 **Flow of Events**

The Flow of Events will include the necessary steps to “Cancel Authorization”.

1.4.1 Activity Diagram – see Figure 125.

10 1.4.2 *Basic Flow*

1. The USER selects to cancel the authorization.
2. The system will prompt the user for a reason for cancellation.
3. The USER will select a reason.
4. The USER will submit the cancellation.
- 15 5. The system will update the ARMS Web database to reflect that the USER cancelled the Authorization.
6. The system will read the USER profile for the confirmation settings.
7. This ends the use case.

20

1.4.3 Alternative Flows

1.4.3.1 Previous

25 After step 3, the USER can abandon all changes, which result in the system state remaining unchanged. After clicking the “Previous” button, the USER will be returned to the screen from which they came.

1.4.3.2 Additional Comments

30 When canceling a rental, the USER must select a reason from the drop-down box to explain why the cancellation is taking place. As well, if further explanation is desired, there is a comment box in

which the USER may enter additional comments for more clarification. This section is optional, unless the USER selects “Other” from the reason code drop-down box. In this case, the comment box must be used.

5

1.4.3.3 Display Confirmation

After step 6, the USER may wish to have a confirmation page displayed, indicating that some type of change has taken place.

10

The confirmation page is completely optional, therefore, at anytime the USER wants to set their profile to bypass this screen, he/she may do so.

1.4.3.4 Update USER Profile

15

During the confirmation process, the USER has the option of changing their profile setting to display or hide the confirmation page. Each time the setting is changed, the USER profile must be updated to reflect the new requirements set by the USER.

1.5 Post-Conditions

20

- If the use case was successful then the changes should go in to effect immediately and generate a transaction record to pass to ARMS indicating that the authorized reservation was cancelled.
- If the use case was unsuccessful then the system will remain unchanged.

25

1.6 Special Requirements

- When canceling an authorization, the USER must select a reason from the drop-down list. If the USER chooses “Other” from the pre-defined list, a comment about why the authorization was cancelled must be supplied.

30

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

5

2.1 Cancel Direct Bill Authorization

This screen (see Figure 126) will allow the USER to pick which functions that he/she may want to change.

10

2.1.1 Screen Layout - Cancel Direct Bill Authorization - see Figure 126

2.1.2 Cancel Direct Bill Authorization

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reason	List Box	50	Cancellation Reason	NOTE	N/A
Comment:	Input	50	Message Text	NOTE	Required if cancellation reason is "Other"
Claim #	Output	30	Claim Number	Insurance Claim Number	
Renter's Name	Output	30	Renter's Name	First Name + Last Name	N/A

2.1.3 Screen Function Definition

15

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Previous

20

When clicked, the user will be returned to the screen/use case where they were prior to selecting Cancel Reservation. Any changes made will be lost and the system will remain unchanged.

2.1.3.2 Process

When clicked, the system will update the message file with the comment record if entered and mark the current reservation authorization as cancel. The cancellation and the new message, if entered, will be forwarded to the ARMS system. The system returns the USER to the appropriate Action Items List screen.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 Cancel Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZCNDT
Label Name	Cancel Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Cancellation Code

Entity	ARM: Authorization(Claim Info)
Column Name	AZCNCD
Label Name	Cancellation Code
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.3 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.4 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.5 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.6 Last Name

Entity	ARM: Renter Detail
--------	--------------------

Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.7 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.8 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNLC
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

5

5. Questions and Answers

Issue Number: 418

10

Question: Do we need a reason to cancel - have cancel page.

Status: Closed - Resolved

Resolution: 6-23-00, Per Neil, kill this page, it's not necessary.

Functional Design Specification

5 View Customer File

Version 1.0

View Customer File

10

1. Search and View Customer File

1.1 Brief Description

15 This use case describes the process that a USER would use to find and view information regarding a rental. In order to view the rental detail, one of two general conditions must be satisfied:

- 1) The rental is open and the USER does not have any authority to make changes.
- 2) The rental is in a state that no longer allows changes to be made.

20 If these conditions are not met, the USER will be taken to the appropriate use case.

1.2 Use Case Actors

All actors will use the use case to View Rental Detail in the ARMS Web system.

25 All of the following actors can be defined generically as a USER:

- **ADJUSTER**
- **PROCESSOR**
- **COMPANY MANAGER**
- **ENTERPRISE ADMINISTRATOR**
- 30 • **COMPANY ADMINISTRATOR**

1.3 Pre-Conditions

- The USER must be signed-on to the system
(AND)
- The USER does not have the authority to make changes and the ticket is open,
(OR)
- The ticket is in a state that doesn't allow changes to be made.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to View Rental Detail in the ARMS Web system.

1.4.1 Activity Diagram – see Figure 127.

1.4.2 Basic Flow

The **Basic Flow** of the View Rental Detail use case includes all of the required activities for the USER to successfully find and view information regarding an open rental.

1. The USER initiates a search for a Customer File.
2. The system, based on criteria entered by the USER, retrieves the matches for that search.
3. The system displays the search results.
4. The USER selects one of the matches.
5. The system displays the detail of the Customer File.
6. This ends this use case.

1.4.3 Alternative Flows

1.4.3.1 Search Again

After step 3 of the basic flow, the USER may decide that they would like to conduct another search. By entering new search criteria, they would return to step 2 with new criteria and the use case could continue.

1.4.3.2 Only One Match Found

At step 2 of the basic flow, if the system only finds one match, the system will advance to step 5 of the basic flow invoking the appropriate use case for modifications.

1.4.3.3 View Only

If the Customer File selected was in a state not allowing changes, the system would display the Customer File, however, not allowing the USER to modify any information within ARMS Web.

1.5 Post-Conditions

- If the use case is successful, the system will return to its previous state.
- If the use case is unsuccessful, the use case the system will remain unchanged.

1.6 Special Requirements

To successfully locate a customer file, the following criteria must be satisfied:

1. The following fields will limit the search results: Adjuster Name, Last Authorized Day, Date of Loss, and/or a status of the Customer File.
 - a. If a Renter Last Name has been supplied, an exact match on last name is considered valid.
 - b. If a Renter Last Name and Renter First Name has been supplied and there is no exact match on Renter Last Name, there is no match.
 - c. If a Renter Last Name and Renter First Name has been supplied and there is an exact match on Renter Last Name and not an exact match on Renter First Name, the Renter Last Name with the closest Renter First Name is considered a match.
 - d. If a Renter Last Name and Claim Number has been supplied and there is an exact match on Renter Last Name and not on Claim Number, the closest match on Renter Last Name and the closest

match on Claim Number greater than the Claim Number provided is considered a match.

2. If the USER supplies one or more of the following fields, the above result set will position to closest match of Customer Files based on: Renter Last Name, Renter First Name, and/or Claim Number.
3. This search capability will include all available Open and Closed Rentals for searching.
4. Any empty fields signify the search should not limit the result set by that field.
5. Any Customer File present in the result set will contain a link to the appropriate use case based on the current status of the reservation or rental.

1.7 Extension Points

1.7.1.1 MA-10 Authorized a Request

If the customer file were an unauthorized reservation or ticket, the system would enter the Authorization use case to allow the USER to authorize this Customer File.

1.7.1.2 MA-12 Extend Rental

If the customer file were an authorized ticket or an action item of extension status, the system would enter the Extend Rental use case to allow the USER to extend this Customer File.

1.7.1.3 MA-13 Change Authorization

If the customer file were an authorized reservation or ticket not requiring any immediate action, the system would enter the Change Authorization use case to allow the USER to authorize this Customer File.

1.7.1.4 MA-07 Additional Charges

The Additional Charges use case will be used to add special charges to the reservation being created by the USER (e.g., CDW). Any Additional

Charges captured should be returned and applied to the reservation. The existence of Additional Charges should be reflected on the reservation screen.

5 1.7.1.5 MA-08 View Car Class

The View Car Class use case will be used to allow the USER to view details about and select a car class to apply to a reservation. Details will include the average number of passengers and luggage items that can be served by a vehicle in the specific car class. The car class selected by the USER should be applied to the reservation.

1.7.1.6 Invoicing - BI-01-Handle Unapproved Invoices & BI-02 Pay Approved Invoices & BI-03 Reject an Invoice

At step 5, the USER may elect to view approved invoices, unapproved invoices, or rejected invoices. Upon completion of this process, the USER should be returned back to step 5 of the Basic Flow.

2. **Screen Design**

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 **Find a Customer (tab)**

This screen will allow the USER to view the rental.

2.1.1 Find a Customer (tab) - see Figure 128

2.1.2 Customer (tab)

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
last name	Input	20	Renter last name	Last name	
first name	Input	20	Renter's first name	First name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
claim number	Input	30	Insurance claim number	Ins. Claim number	N/A.
adj. last name	Input	20	Adjuster's last name	Last name	N/A.
last date authorized:	Input	20	Last date authorized	LAST AUTH DAY	N/A.
status:	List Box	20	Contract Status	Status Code	N/A.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Search

When clicked, the will search for any records that match the criteria listed.

2.2 Customer File - Closed Items

This screen will allow the USER to view the rental when closed.

2.2.1 Screen Layout - Customer File - Closed Items - see Figure 129

2.2.2 Customer File - Closed Items

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Actual Days:	Output	3	actual days rented	Item Quantity	Invoicing Section Only
@	Output	3	Actual Rate Rented	Item Rate	Invoicing Section - Actual Rental only
=	Output	8	Amount charged	Item Amount	Invoicing sections, Actual Rental only
Billed Period: ____ to ____ (____ days)	Output	30	Billing start date, end date and number of days	Item Quantity	Invoicing section only

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
	Output	3	Number of days authorized	Item Quantity	Invoicing, Actual Rental Section only
Sales Tax (___%)	Output	3	Sales Tax	Item Description	Invoicing, Actual Rental section only
Billed Period: _____ to _____ (___ days)	Output	30	Billing start date, end date and number of days	Bill to End Date	Invoicing section only
Billed Period: _____ to _____ (___ days)	Output	30	Billing start date, end date and number of days	Bill to Start Date	Invoicing section only
Federal ID:	Output	12	Federal ID Number	Federal ID Number	Only shown in Invoicing sections
Invoice Date:	Output	10	Invoice Date	Record Add Date	Only used in the invoice sections
Reference:	Output	32	Reference Number	Invoice Number	Only in the invoice sections
Amount Received	Output	8	Amount Received	Total Amount Received	Invoicing, Actual Rental sections only
Total Charges:	Output	8	Total Charges	Total Ticket Charges	Invoicing, Actual Rental Section only
Total Due:	Output	8	Total Due	Total Amount Due	Invoicing, Actual Rental sections only
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	
Authorized Period: _____ to _____ (___ days)	Output	30	Authorized Start Date	Start Date + End Date + Days authorized-detail	Only in invoicing sections
Date	Output	8	Message Creation Date	Add Date	N/A.
Message to Branch Location:	Output	50	Message Text	NOTE	
Notebook	Output	50	Message Text	NOTE	N/A.
Authorized Class:	Output	20	Car Class Name	Vehicle Class	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Current Class:	Output	20	Car Class Name	Vehicle Class	N/A.
Claim Number:	Output	11	Claim Number	Insurance Claim Number	
Claim No.	Output	30	Claim Number	Insurance Claim Number	
Daily Rate/Max. Dollars	Output	10	Daily Policy Rate and Maximum Policy Rate	Dollars Per Day Covered + Max \$ Covered	Invoicing section only
Direct Bill Percent	Output	4	Direct Bill Percent	Bill To %	Invoicing sections only
Direct Bill Percent	Output	8	Direct Bill Percent	Bill To %	Invoicing sections Actual Rental only
	Output	30	Rental Location Branch Name	Rental Location	
Days/Rate	Output	6	Rental Location Rate and number of days	Number Of Days Authorized	N/A.
Days/Rate	Output	6	Rental Location Rate and number of days	Vehicle Rate	N/A.
@	Output	7	Rental Rate per day	Rate Charged	Invoicing section only
Rental Period: ____ to ____ (____ days)	Output	30	Rental Start	Start Date + End Date + CALCULATED	Invoicing sections only
Rental Date	Output	10	Rental Start Date	Start Date	
Start Date	Output	10	Start Date of rental	Start Date	
Insured Name:	Output	30	Insured's Name	First Name + Last Name	
	Output	30	Rental Location Address	Address Line + Address Line2	N/A.
	Output	25	Rental Location City Name	City	N/A.
	Output	10	Rental Location Postal / Zip Code	Zip Code	N/A.
	Output	3	Rental Location State / Province Code	State	N/A.

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
	Output	13	Rental Location Telephone Number	Telephone Number	N/A.
Date of Loss:	Output	10	Date of Loss	Date Of Loss	
	Output	20	Renter City Name	City	
	Output	10	Renter Postal / Zip Code	Zip Code	
	Output	3	Renter State / Province Code	State	
	Output	30	Renter Street Address	Address Line	
Renter Email:	Output	20	Renter's Email	Day Phone	
Home Phone:	Output	16	Renter's Home Phone	Renters Night Phone + Renters Night Phone Extension	
Renter Information:	Output	30	Renter's Name	First Name + Last Name	N/A.
Renter Name:	Output	30	Renter's Name	First Name + Last Name	
Owner's Vehicle	Output	4	Renter's Vehicle Year, Make and Model	Renter Vehicle Year + Renter Make/Model	
Work Phone:	Output	16	Renter's Work Phone	Day Phone + Renters Day Phone Extension	
Repair Facility:	Output	20	Body Shop Name	Repair Facility Name	
Phone Number:	Output	16	Body Shop Phone Number	Telephone Number	
	Output	20	Repair Facility City	City	
	Output	3	Repair Facility State	State	
	Output	7	Repair Facility Zip Code	Zip Code	
=	Output	10	Amount charged	CALCULATED	Invoicing sections only
Total authorized Includes Tax & Surcharge	Output	8	Total authorized amount	CALCULATED	Invoicing sections only

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Renter Type	Output	15	Claim Type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	
Vehicle Condition	Output	15	Loss Type	loss type description	
Renter Email:	Output	20	Renter's Email	renter email	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 Previous

When clicked, the USER will be taken back to the use case from where they came.

2.2.3.2 Printer Friendly Version

When clicked, the system will bring up a screen that only shows the particular invoice for which you clicked this button. The USER may print from this screen.

2.2.3.3 Top of page

When clicked, the USER will be taken to the top of the current page.

2.3 Search Results

This screen will allow the USER To view the rental when closed.

2.3.1 Screen Layout - Search Results - see Figure 130

2.3.2 Search Results

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Last Date	Output	10	Authorization Date		
Status	List Box	10	Contract Status	Status Code	
last date authorized	Input	5	Last Day Authorized	LAST AUT DAY	
adj. last name	Input	15	Adjuster Last Name	Last Name	
Adjuster Name:	Output	20	Adjuster Name	First Name + Last Name	
Handling for:	List Box	15	Handling for Adjuster Name	First Name + Last Name	
File Type	Output	15	Status	Status Description	
confirmation number	Input	52	Confirmation Number	Transmission Code	
Claim Number	Output	30	Claim Number	Insurance Claim Number	Populated by the data matching the search criteria
claim number	Input	30	claim number	Insurance Claim Number	
Loss Date	Output	10	Date of Loss	Date Of Loss	
first name	Input	15	Renter's First Name	First Name	
last name	Input	15	Renter's Last Name	Last Name	
Renter's Name	Output	30	Renter's Name	First Name + Last Name	Returned data from the search criteria
Claims Office:	List Box	5	Office ID	external organization abbreviated name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
You requested a search for:	Output	30	Search Criteria	NOT STORED	<p>This field will be populated by the criteria used to search for a particular record.</p> <p>This field may be at Last Name, First Name, Claim Number, Confirmation Number, Adjuster Last Name or Status. The data in this field</p>

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Search Again

When clicked, the system will re-search the database after the USER has entered new or additional criteria.

2.3.3.2 Top of page

When clicked, the USER will be taken to the top of the current page.

2.3.3.3 View Next 10>>>

When clicked, the system will display the next 10 items that match the search criteria.

3. Application Operations

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

4.1.1 Add Date

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEADDT
Label Name	Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.2 Address Line

Entity	ARM: Renter Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.3 Address Line

Entity	ARM: Renter Detail
Column Name	RKADL1
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 Address Line2

Entity	ARM: Renter Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.5 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

5

4.1.6 Bill to End Date

Entity	A4 Invoice Header
Column Name	IIBTDT
Label Name	Bill to End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.7 Bill to Start Date

Entity	A4 Invoice Header
Column Name	IISRDT

Label Name	Bill to Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.8 Branch

Entity	ARM: Rental Location Master
Column Name	Branch
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.9 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.10 City

Entity	ARM: Renter Detail
Column Name	RKCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.11 City

Entity	ARM: Repair Detail
Column Name	RUCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.12 claim type code

Entity	AUTHORIZATION EXTENSION
Column Name	clm_typ_cde
Label Name	claim type code:
System Name	CLMTYPCDE
Data Type	DEC(3,0)
Attribute Definition	The claim type code defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

5

4.1.13 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.14 company identifier

Entity	EXTERNAL ORGANIZATION
--------	-----------------------

Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.15 Date of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date Of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.16 Day Phone

Entity	ARM: Renter Detail
Column Name	RKDYPH
Label Name	Day Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

5

4.1.17 Days authorized-detail

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NEAUDY
Label Name	Days authorized-detail

System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.18 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.19 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

5

4.1.20 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	E OID
Data Type	DEC(11,0)

Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or government agencies.
----------------------	--

4.1.21 Federal ID Number

Entity	A4 Invoice Header
Column Name	IIFETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.22 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.23 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.24 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.25 Group

Entity	ARM: Rental Location Master
Column Name	Group
Label Name	Group Number
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.26 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.27 Invoice Number

Entity	A4 Invoice Header
Column Name	I1INNO

Label Name	Invoice Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.28 LAST AUT DAY

Entity	A4 Cross Reference
Column Name	X4LADT
Label Name	LAST AUT DAY
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.29 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.30 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.31 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.32 loss type code

Entity	AUTHORIZATION EXTENSION
Column Name	loss_typ_cde
Label Name	loss type code:
System Name	LOSSTYPECDE
Data Type	DEC(3,0)
Attribute Definition	The loss type code defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

5

4.1.33 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.34 Max \$ Covered

Entity	ARM: Authorization (Claim Info)
Column Name	AZ\$MAX
Label Name	MAX \$ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.35 message ecars indicator

Entity	AUTHORIZATION MESSAGE
Column Name	msg_ecars_ind
Label Name	message ecars indicator:
System Name	MSGECARIND
Data Type	CHAR(1)
Attribute Definition	The message ecars indicator indicates whether the message is sent/received from the ecars system.

5

4.1.36 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.37 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY

Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.38 Rate Charged

Entity	ARM: Authorization(Claim Info)
Column Name	AZRTCH
Label Name	Rate Charged
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.39 Record Add Date

Entity	A4 Invoice Header
Column Name	I1ADDT
Label Name	Record Add Date
System Name	
Data Type	NUMBER(8)
Attribute Definition	

5

4.1.40 Rental Location

Entity	ARM: Authorization(Claim Info)
Column Name	AZRNLC
Label Name	Rental Location
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.41 renter email

Entity	RENTER EXTENSION
Column Name	rentr_eml
Label Name	renter email:
System Name	RENTREML
Data Type	CHAR(70)
Attribute Definition	The email address of the renter.

4.1.42 Renter Make/Model

Entity	ARM: Renter Detail
Column Name	RKVHMM
Label Name	Renter Make/Model
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.43 Renter Vehicle Year

Entity	ARM: Renter Detail
Column Name	RKVHYR
Label Name	Renter Vehicle Year
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.44 Renters Day Phone Extension

Entity	ARM: Renter Detail
Column Name	RKDYEX
Label Name	Renters Day Phone Extension

System Name	
Data Type	NUMERIC(4)
Attribute Definition	

4.1.45 Renters Night Phone

Entity	ARM: Renter Detail
Column Name	RKNTPH
Label Name	Renters Night Phone
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.46 Renters Night Phone Extension

Entity	ARM: Renter Detail
Column Name	RKNTEX
Label Name	Renters night Phone Extension
System Name	
Data Type	NUMERIC(4)
Attribute Definition	

5

4.1.47 Repair Facility Name

Entity	ARM: Repair Detail
Column Name	RURFNM
Label Name	Repair Facility Name
System Name	
Data Type	CHAR(35)
Attribute Definition	

4.1.48 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type code. For example: "Authorization confirmed on & Date with Reservation Number & Resnumber"

4.1.49 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.50 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.51 State

Entity	ARM: Renter Detail
--------	--------------------

Column Name	RKSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.52 State

Entity	ARM: Repair Detail
Column Name	RUSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.53 Status Description

Entity	ARM: ARMS/400 Cross Reference Status Table File
Column Name	XUSTDS
Label Name	Status Description
System Name	
Data Type	CHAR(6)
Attribute Definition	

5

4.1.54 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)

Attribute Definition	
----------------------	--

4.1.55 Telephone Number

Entity	<i>ARM: Repair Detail</i>
Column Name	RUPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.56 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	13BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

5

4.1.57 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	13RC\$\$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.58 Total Ticket Charges

Entity	A4 Invoice Trailer
--------	--------------------

Column Name	13TO\$\$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.59 Transmission Code

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NETRCD
Label Name	Transmission Code
System Name	
Data Type	Char(1)
Attribute Definition	

4.1.60 Vehicle Class

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHCS
Label Name	Vehicle Class
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.61 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)

Attribute Definition	
----------------------	--

4.1.62 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

4.1.63 Zip Code

Entity	ARM: Rental Detail
Column Name	RKZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5

4.1.64 Zip Code

Entity	ARM: Repair Detail
Column Name	RUZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Functional Design Specification

Handle Unapproved Invoices

10

Version 1.1**1. Handle Unapproved Invoices Use Case****5 1.1 Brief Description**

The Handle Unapproved Invoices use case describes how the Adjuster would review invoices and approve them for payment. The use case will then describe the processes the Adjuster will follow in the case where the Adjuster is the one that is actually paying the invoice.

10

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this case to approve and either pay unapproved invoices or send them on to a PROCESSOR for payment.

15

1.3 Pre-Conditions

- The ADJUSTER must be logged into the ARMS Web system.
- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be able to handle invoices.

20

1.4 Flow of Events

The Flow of Events will include the necessary steps for an ADJUSTER to approve and pay invoices.

25

1.4.1 Activity Diagram – see Figure 131.

1.4.2 Basic Flow

1. The ADJUSTER will view the detail of the invoice.
2. If the ADJUSTER chooses to pay the invoice immediately, execute subflow 1.4.2.3 – Pay a Single Invoice. Otherwise continue the Basic Flow.

30

3. The ADJUSTER will approve the invoice.
4. The system will mark the invoice approved.
5. If the ADJUSTER pays their invoices, then the invoice will be added to their payment list. If a PROCESSOR pays their invoices, then the invoice will be added to the PROCESSOR'S payment list.
6. The system will update the ARMS Web database.
7. If this is the last or only invoice in the action items list, then continue to step eight of the Basic Flow. Otherwise, the use case ends.
8. The system will check to see if the ADJUSTER'S office is set up for individual payment or bulk payment.
 - If the ADJUSTER'S office is set up for individual payment execute subflow 1.4.2.1, Individual Pay.
 - If the ADJUSTER'S office is set up for bulk payment execute subflow 1.4.2.2, Bulk Pay.

1.4.2.1 Individual Payment List

1. The system will display instructions for paying the invoices individually and a summary list of all the invoices just approved by the ADJUSTER.
2. For each invoice on the payment list, the ADJUSTER may enter the associated check number.
3. The ADJUSTER will submit the payment list to the system.
4. The system will mark the invoice paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.2 Bulk Payment List

1. The system will display instructions for paying the invoices in bulk and a summary list of all the invoices just approved by the ADJUSTER.

2. The ADJUSTER may enter the check number of the check that is paying all the invoices on the payment list.
3. The ADJUSTER will submit the payment list to the system.
4. The system will mark the invoice paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.3 Pay A single Invoice

1. The ADJUSTER may enter the check number for the invoice being paid.
2. The system will mark the invoice paid.
3. The system will update the ARMS Web database.
4. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Selected Action Item is Payment List

At step one of the Basic Flow, if the action item being worked is the "Payment List" action item, then the ADJUSTER will be taken immediately to step one of section 1.4.2.1 if they are set up for individual pay, or step one of section 1.4.2.2 if they are set up for bulk pay.

1.4.3.2 Reject an Invoice

At step one in the Basic Flow, the ADJUSTER may choose to reject the invoice. The rejection process is executed using extension point BI-03 – Reject an Invoice.

1.4.3.3 View Customer File

At Individual Payment List or Bulk Payment List, the ADJUSTER may choose to view detail information about the rental. The view rental detail process is executed using extension point MA-19 – View Customer File.

1.4.3.4 Print a Single Invoice

5 At step one in the Basic Flow, the ADJUSTER may choose to print the invoice. If they so choose, they may also print the rental history. The system will display a printer friendly screen and the ADJUSTER will choose to print via their browser window. Upon printing, the ADJUSTER will choose to return to the step one of the Basic Flow by hitting the “back” button on the web browser.

1.4.3.5 Print an Invoice List

10 At step one in section 1.4.2.1, Individual Pay, or section 1.4.2.2, Bulk Pay, the ADJUSTER may choose to print the invoice list of all invoices on the Payment List. If they so choose, they may also print the rental history for all invoices. The system will display a printer friendly screen and the ADJUSTER will choose to print via their browser window. Upon printing, the ADJUSTER will choose to return to the step one of section 1.4.2.1 if the ADJUSTER is set up for Individual Pay, or section 1.4.2.2 if the ADJUSTER is set up for Bulk Pay.

20

1.4.3.6 Skip Invoice

25 At step three in the Basic Flow, the ADJUSTER may choose to skip the invoice in question and handle it at a later time. The ADJUSTER will be taken to the next action item on their action item list. The status of the invoice should not be changed by the ARMS Web system.

1.4.3.7 Payment by PROCESSOR

30 If the ADJUSTER is only responsible for approving the invoice, then, after step four in the Basic Flow, the system will make the approved invoice an action item for the PROCESSOR(S) responsible for paying the ADJUSTER’S invoices. This ends the

use case. Payment by PROCESSOR is handled via Functional Specification BI-02 – Pay Approved Invoices.

1.4.3.8 Amount Being Approved Exceeds USER’S Authorization Limits

5 When a USER attempts to approve an invoice for payment, the system will check to see if the amount due on the invoice is greater than the USER’s authorization amount. If the amount due is greater than the USER’S limit, the system will not allow the approval and will request that the USER transfer the invoice to
10 another user with authorization limits that are great enough to approve the invoice.

1.4.3.9 Change Claim Number

15 At step one in the Basic Flow, if the status is “rejected” and if the profile allows, the ADJUSTER may choose to change the claim number associated with an invoice. Once a claim number has been updated, the ADJUSTER will continue with step four of the basic.

20 **1.5 Post-Conditions**

- If the use case was successful and the ADJUSTER is responsible for paying invoices, the approved invoices should be marked as paid in the ARMS Web system.
- If the use case was successful and the ADJUSTER is only responsible for
25 approving invoices, then the approved invoices should be marked as adjuster approved in the ARMS Web system.

1.6 Special Requirements

30 The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 *ARMS Web Routes Invoices*

Before an ADJUSTER receives an invoice to be approved, the ARMS Web system will look at the invoicing criteria for the owning office and owning adjuster and make a determination as to whether the invoice is auto approved or adjuster approved. If an invoice is auto approved, the invoice will always be assigned to a processor for payment without it ever being sent to an adjuster for approval. The payment method may be either bulk or individual payment.

1.6.2 *Includes Tax and Surcharge Data Field*

On the invoice next to the authorized amount, the field “Includes Tax and Surcharge” will be displayed next to the Authorized total if that total should include taxes and surcharges. This will occur in two events. For an insured, if the authorized amount is less than the policy daily amount, the authorized total will include taxes and surcharges up to the policy daily amount. For a claimant, the authorized amount will always include taxes and surcharges, without limit, until the rental is terminated by the ADJUSTER.

1.6.3 *Data Fields to Assist with Future Releases or Customer Integration*

It must be possible to capture the following information at some point in the future because of either planned future releases or customer integration.

- Amount Being Paid on Each Invoice

1.7 **Extension Points**

An extension point indicates a link between this use case and another use case. Extension points associated with the use case are indicated below. Clicking on the extension point will open the related use case.

1.7.1 *BI-03 Reject an Invoice*

The Reject an Invoice Functional Specification is used to reject a specific invoice to Enterprise due to missing required information or an incorrect

amount on the bill. Upon completion of the Reject an Invoice Functional Specification, the ADJUSTER should be returned to step six of the Basic Flow in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system. The rejected invoice should be marked as rejected by the system. The Handle Unapproved Invoices Functional Specification will only allow for one invoice to be rejected at a time.

1.7.2 MA-19-View Rental Detail

The View Rental Detail Functional Specification is used to review the rental history in regards to a specific rental. Upon completion of the View Rental Detail Functional Specification, the ADJUSTER should be returned to step four of the Basic Flow in the Handle Unapproved Invoices Functional Specification. Any previously approved invoices should still be approved in the system.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Invoicing – Individual Payment

This screen will allow the user to choose to view the invoice selected in the action items list. They will choose to either pay this invoice immediately (pay now), or choose to add it to a payment list for payment later in conjunction with all their other invoices. They may also choose to print the invoice from this page. They may also optionally choose to print the rental history. The user may choose to change the claim number. Finally the user may choose to skip this invoice and leave it until later for review.

2.11 Invoicing – Individual Payment – see Figure 132

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Line Item Charge Description	Item Description	This line may repeat multiple times depending on the number of taxes and surcharges that apply.
	Output	15,2	Line Item Charge Description	Item Amount	Line Item Charge Qty * Line Item Charge Amount. This line may repeat multiple times depending on the number of taxes and surcharges that apply.
Claim No:	Input	15	Claim Number	Insurance Claim Number	
Invoice Date:	Output	10	Invoice Date (Ecar's Ticket Date)	Record Add Date	
Reference:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID + ECARS Ticket Number
Please include this reference number on your check	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number
Federal ID:	Output	30	Location's Federal Id.	Federal ID Number	
Federal ID:	Output	30	Location's Federal ID	Federal ID Number	
Amount Received	Output	15,2	Amount of rental Charges received	Total Amount Received	
Total Due:	Input	15,2	Total Amount Due from Ins. Company	Total Amount Due	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Total Charges:	Output	15,2	Total Rental Ticket Charges	Total Ticket Charges	
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	150	Messages	NOTE	This field will repeat multiple lines for all diary notes (messages) for this reservation.
to	Output	10	Authorization Termination Date	End Date	
to	Output	10	Authorization Termination Date	End Date	
Direct Bill Percent	Output	15,0	Authorized Bill percentage	Bill to %	
Direct Bill Percent	Output	15,0	Authorized Bill percentage	Bill to %	
Authorized Period:	Output	10	Authorized Start Date	Start Date	
Billed Period:	Output	10	Authorized Start Date	Start Date	
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with the claim number currently on the authorization.
to	Output	10	Close date of Rental Ticket	End Date	
Policy: Daily Rate-Max Dollars:	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Dollars Per Day Covered	
Policy: Daily Rate-Max Dollars:	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Max \$ Covered	
Rental Period:	Output	10	Start date of Rental Ticket	Start Date	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Insured Name	Output	30	Insured's Name	First Name + Last Name	
For	Output	30	Insured's name	First Name + Last Name	
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	
	Output	30	Rental Location's Mailing Street Stress	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	
	Output	30	Rental Location's mailing City, State, and Zip	City	
	Output	30	Rental Location's Mailing City, State, and Zip	State	
	Output	30	Rental Location's mailing City, State, and Zip	Zip Code	
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	This field is repeated for each invoice in the payment list.
Renter	Output	30	Renter's Name	First Name + Last Name	
(	Output	5	Number of Authorized Days	CALCULATED	
(	Output	5	Number of authorized days	CALCULATED	
(	Output	5	Number of Rental Days	CALCULATED	
Total Due	Output	15,2	Total Amount Due from Ins. Company	CALCULATED	Total Charges – Amount Received

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Number of Authorized Dates + "@" + authorized Daily Rate + "/day="	Output	15,2	Total Authorized Amount before tax and surcharge	CALCULATED	Number of Authorized Days * Authorized Daily Rate
Total authorized includes Tax & Surcharge	Output	15,2	Total authorized amount with Tax and surcharge	CALCULATED	(Number of authorized Days * Authorized Daily Rate) + Calculated Tax and surcharge
Number of Rental Days + "@" + ECAR's Ticket Daily Rate + "/day="	Output	15,2	Total Ticket Rental Amount before tax and surcharge	CALCULATED	Number of Rental Days * ECARS Ticket Daily Rate.
Claim Type:	Output	10	Claim Type	claim type description	
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	20	Loss Type	loss type description	
Rental	Output	30	Rental Location's Accounting Name	accounting name	
Send Payment To:	Output	30	Rental Location's Accounting Name	accounting name	
Check Number for your payment	Input	20	Check Number	check number	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 *PRINTER FRIENDLY PAGE*

When clicked, the user will be taken to the “Printer Friendly View” of the current invoice.

5

2.1.3.2 *REJECT*

When clicked, the user will be taken to the Reject Invoice process.

2.1.3.3 *PAY NOW*

10

When clicked, the system will edit the current information. If the edit passes, the invoice will be marked as paid and the data files updated. If the validation fails, the user will be returned to the current screen with the errors highlighted.

15

2.1.3.3.1 The system will validate that the user has an authorization limit high enough to approve the invoice. If not, the system will generate an error and ask the USER to transfer the invoice.

2.1.3.4 *ADD TO PAYMENT LIST*

20

When clicked, the system will edit the current information for check number and claim number. If the edit passes, the invoice will be marked as approved and will be added to the ADJUSTER’S payment list and the user will be returned to the Review List process.

25

2.1.3.5 *SKIP>>*

When clicked, the user will be advanced to the next action item to be processed and the current invoice will remain unchanged (un-approved).

30

2.1.3.6 *Top of Page*

When clicked, the user will be taken to the top of the current invoice page.

2.1.3.7 Transfer File

When clicked, the system will present a list of users that have authorization limits greater than the amount due on the invoice.

5 The USER may then choose one user from this list to which they may transfer the file.

2.1.3.8 Policy Information

Policy Information will only be shown under the Authorized
10 Section if the claim type is NOT claimant.

2.2 Invoicing – Approval

This screen will allow the user to choose to view the invoice selected in the action items list. They may choose to approve the invoice payment. This will
15 add the invoice to the PROCESSOR(S) that are responsible for paying the ADJUSTER'S invoices. The user may also choose to skip this invoice and leave it until later for review. They may choose to print the invoice from this page. They may also optionally choose to print the rental history. Finally, the user may choose to change the claim number.

20

2.2.1 Screen Layout – invoicing Approval.shtml – see Figure 133

2.2.2 Invoice Approval

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	152	Line item Charge Amount	Item Amount	Line Item Charge Qty * Line Item Charge Amount. This line may repeat multiple times depending on the number of taxes and surcharges that apply.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	15	Line Item Charge Description	Item Description	This line may repeat multiple times depending on the number of taxes and surcharges that apply.
Claim No:	Output	15	Claim Number	Insurance Claim Number	
Claim Number		15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization.
To	Output	10	Close Date of billing of Rental Ticket	Bill to End Date	
Invoice Date:	Output	10	Invoice Date (ECARs Ticket Date)	Record Add Date	
Reference	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number
Federal ID:	Output	30	Location's Federal Id.	Federal ID Number	
Billed Period	Output	10	Start date of billing of Rental Ticket	Bill to Start Date	
Amount Received:	Output	15,2	Amount of Rental received.	Total Amount Received	
Total Due	Output	15,2	Total amount due from Ins. Company	Total Amount Due	
Total Charges:	Output	15,2	Total Rental Ticket Charges	Total Ticket Charges	
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	50	Messages	NOTE	This field will repeat multiple lines for all diary notes (messages) for a reservation
To	Output	10	Authorization Termination Date	End Date	
Direct Bill Percent:	Output	15,0	Authorized Bill percentage	Bill To %	
Direct Bill Percent	Output	15,0	Authorized Bill percentage	Bill To %	
Authorized Period:	Output	10	Authorized Start Date	Start Date	
To	Output	10	Close Date of Rental Ticket	End Date	
Policy: Daily Rate/Max Dollars	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Dollars Per Day Covered	
Policy: Daily Rate/Max Dollars	Output	15,2	Policy Daily Maximum Amount + Policy Maximum	Max \$ Covered	
Rental Period:	Output	10	Start date of Rental Ticket	Start Date	
Insured Name:	Output	30	Insured's name	First Name + Last Name	
For:	Output	30	Insured's Name	First Name + Last Name	Renter's Last Name + Renter's First Name
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	Mailing City + Mailing State + Mailing Zip
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	
	Output	15	Rental Location's Phone Number	Telephone Number	
Date of loss:	Output	20	Date of loss	Date Of Loss	
Renter	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
(	Output	5	Number of Authorized Days	CALCULATED	Total number of authorized rental days
(	Output	5	Number of Billed Days	CALCULATED	
(	Output	5	Number of Rental Days	CALCULATED	Total number of authorized Rental Days
Total Due:	Output	15,2	Total Amount Due from Ins. Company	CALCULATED	Total Charges – Amount Received
Number of Authorized Days + “@” + Authorized Daily Rate + “/day=”	Output	15,2	Total authorized amount before tax and surcharge	CALCULATED	Number of Authorized Days * Authorized Daily Rate
Total authorized includes Tax & Surcharge	Output	15,2	Total Authorized Amount with tax and surcharge	CALCULATED	(Number of authorized Days * Authorized Daily Rate) + (Calculated Tax and surcharge)
Number of Rental Days + “@” + ECAR’s Ticket Daily Rate + “/day=”	Output	15,2	Total Ticket Rental Amount before tax and surcharge	CALCULATED	Number of Rental Days * ECARS Ticket Daily Rate
Claim Type:	Output	10	Claim Type	claim type description	Claimant, Insured, etc.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Rental	Output	30	Rental Location’s Accounting Name	accounting name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 *PRINTER FRIENDLY PAGE*

When clicked, the user will be taken to the “Printer Friendly View” of the current invoice.

5

2.2.3.2 *REJECT*

When clicked, the user will be taken to the Reject Invoice process.

2.2.3.3 *APPROVE FOR PAYMENT*

10

When clicked, the currently displayed invoice status will be marked as approved and the user will be taken to the next Action Items.

15

- The system will validate that the user has an authorization limit high enough to approve the invoice. If not, the system will generate an error and ask the USER to transfer the invoice.
- Another adjuster has not already approved the invoice.

2.2.3.4 *SKIP>>*

20

When clicked, the user will be advanced to the next selected action item to be processed and the current invoice will remain unchanged (un-approved).

2.2.3.5 *Top of Page*

25

When clicked, the user will be taken to the top of the current invoice page.

2.2.3.6 *Transfer File*

30

When clicked, the system will present a list of users that have authorization limits greater than the amount due on the invoice. The USER may then choose one user from this list to which they may transfer the file.

2.2.3.7 Policy Information

Policy Information will only be shown under the Authorized Section if the claim type is NOT claimant.

5 2.3 Individual Payment List

This screen provides the user with information on what the system expects them to do, and requests a check number that will be used to pay each invoice. The user may also choose to print the invoices, and optionally print the rental history in addition to the invoices. The user may choose not to process the payment list at this time, in which case the payment list will be added to the user's action items list.

2.3.1 Screen Layout – *invoicingPymtList.shtml* – see Figure 134

15 2.3.2 Individual Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges – Amount Received This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list.
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	This claims office id which the user is currently process work for list.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Enter the check number of your payment here:	Input	20	Check Number	check number	This field is repeated for each invoice in the payment list.

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.3.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.3.3.3 PAY LATER

When clicked, the user will be returned to view list and the requests will remain unchanged.

2.2.3.4 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

2.4 Bulk Payment List

5 This screen provides the user with information on what the system expects them to do, and requests a check number that will be used to pay each invoice. The user may also choose to print the invoices, and optionally print the rental history in addition to the invoices. The user may choose not to process the payment list at this time, in which case the payment list will be added to the user's action items list.

10 2.4.1 Screen Layout – Bulk Payment List – see Figure 135

2.4.2 Bulk Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group ID + Rental Branch ID+ ECARS Ticket number. This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges – Amount Received. This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	The claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 *PRINTER FRIENDLY PAGE*

When clicked, the user will be taken to the “Printer Friendly View” of the current invoices.

5

2.4.3.2 *CONFIRM PAYMENT*

When clicked, the system will mark the reservation as paid and update the database. The update will be passed to the Arms system. The user will then be returned to the next action item or the Action Item screen if no more action items exist.

10

2.4.3.3 *PAY LATER*

When clicked, the user will be returned to Action Items and the request will remain unchanged.

15

2.4.3.4 *Top of Page*

When clicked, the user will be taken to the top of the payment list.

3. **Application Operations**

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This section will detail all the application operations that are part of this Functional Specification Document.

3.1 **Get Unapproved Invoices (Adjuster Id)**

25

The build unapproved invoice list operation finds all the invoices, that need approval, for the specified adjuster.

3.2 **Approve Invoice (Invoice Number)**

The approve invoice operation marks the specified invoice as approved. This invoice is now ready to be paid.

30

3.3 **Get Approved Invoices (Adjuster Id)**

The build approved invoice list operation finds all the approved invoices for the specified adjuster.

3.4 Get Invoice Detail (Invoice Number)

The build invoice detail operation gets the relevant invoice information for the specified invoice number.

5 3.5 Pay Invoice (Invoice Number, Check Number)

The pay invoice operation records the check number specified by the adjuster against the specified invoice and marks the invoice as paid.

4. Data Fields

10

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

15 4.1.1 *accounting name*

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2 *action item assigned date*

Entity	ACTION ITEM
Column Name	actn_item_assn_dte
Label Name	action item assigned date:
System Name	AITMASGNDT
Data Type	DATE
Attribute Definition	The action item assigned date is the date the action item was established and assigned to an administrator or adjustor.

4.1.3 *action item complete date*

Entity	ACTION ITEM
Column Name	actn_item_cmpl_dte
Label Name	action item complete date:
System Name	AITMCMPLDT
Data Type	DATE
Attribute Definition	The action item complete date is the date the action item was completed by an administrator or adjustor.

4.1.4 *action item effective date*

Entity	ACTION ITEM
Column Name	actn_item_eff_dte
Label Name	action item effective date:
System Name	AITMEFFDT
Data Type	DATE
Attribute Definition	The action item effective date is the date the action item will become effective.

5

4.1.5 *action item status code*

Entity	ACTION ITEM
Column Name	actn_item_stat_cde
Label Name	action item status code:
System Name	
Data Type	CHAR(6)
Attribute Definition	The action item status code defines the status of this action item. For example:

4.1.6 *action item type code*

Entity	ACTION ITEM
Column Name	actn_item_typ_cde
Label Name	action item type code:
System Name	
Data Type	DEC(3,0)
Attribute Definition	The action item type code defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an insured with a replacement vehicle. For example: Closing an Of

4.1.7 action item type description

Entity	ACTION ITEM TYPE
Column Name	actn_item_typ_dsc
Label Name	action item type description:
System Name	
Data Type	CHAR(40)
Attribute Definition	The action item type description is a lexical definition of an action item type code which defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an

4.1.8 action related adjustor code

Entity	ACTION ITEM
Column Name	actn_rel_adjr_cde
Label Name	Adjustor Code
System Name	ARADJRCDE
Data Type	CHAR(10)

Attribute Definition	The action related adjustor code is the adjustor code of the adjustor/user which requires completion of some action item work activity such as an office closing and adjustors/users who need to be moved to another office.
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4.1.9 action related company identifier

Entity	ACTION ITEM
Column Name	actn_rel_cmpy_id
Label Name	ARMS Profile ID
System Name	ARCMPYID
Data Type	CHAR(5)
Attribute Definition	The action related company identifier is the company identifier of the adjustor/user which requires completion of some action item work activity such as an office closing and adjustors/users who need to be moved to another office.

4.1.10 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

5

4.1.11 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	

Data Type	CHAR(30)
Attribute Definition	

4.1.12 Adjustor Code

Entity	ARM: Adjustor Master
Column Name	ALAACD
Label Name	Adjustor Code
System Name	
Data Type	CHAR(10)
Attribute Definition	

4.1.13 ARMS Profile ID

Entity	ACTION ITEM
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	The ARMS Profile ID is the company identifier used to uniquely define an authorization.

5

4.1.14 ARMS Profile ID

Entity	ARM: Adjustor Master
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)
Attribute Definition	

4.1.15 assigned to adjustor code

Entity	ACTION ITEM
Column Name	assgn_to_adjr_cde
Label Name	Adjustor Code
System Name	AADJRCDE
Data Type	CHAR(10)
Attribute Definition	The assigned to adjustor code is the adjustor code of the administrator or adjustor's who is assigned the action item.

4.1.16 assigned to company identifier

Entity	ACTION ITEM
Column Name	assgn_to_cmpy_id
Label Name	ARMS Profile ID
System Name	ACMPYID
Data Type	CHAR(5)
Attribute Definition	The assigned to company identifier is the company identifier of the administrator or adjustor's who is assigned the action item.

4.1.17 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

5

4.1.18 Bill to End Date

Entity	A4 Invoice Header
Column Name	IIBTDT

Label Name	Bill to End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.19 Bill to Start Date

Entity	A4 Invoice Header
Column Name	IISRDT
Label Name	Bill to Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.20 check number

Entity	RENTAL INVOICE PAYMENT
Column Name	chk_nbr
Label Name	check number:
System Name	CHKNBR
Data Type	DEC(11,0)
Attribute Definition	

5

4.1.21 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.22 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:
System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.23 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

5 4.1.24 company structure level code

Entity	ACTION ITEM
Column Name	cmpy_strct_lv_cde
Label Name	company structure level code:
System Name	CMPYSLVLCD
Data Type	DEC(3,0)

Attribute Definition	The external organization structure level code identifies the kind or type of internal organizations of the external organizations which Enterprise Rent-A-Car does business with. Such as: Corporation, Branch Claims Office, Region, Area, Subregion, etc.
----------------------	--

4.1.25 Customer Transaction ID

Entity	ACTION ITEM
Column Name	AZCUTI
Label Name	Customer Transaction ID
System Name	
Data Type	CHAR(20)
Attribute Definition	The Customer Transaction ID is the authorization transaction identifier which along with a company identifier uniquely define an authorization.

4.1.26 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

5

4.1.27 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)

Attribute Definition	
----------------------	--

4.1.28 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.29 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

5

4.1.30 external organization identifier

Entity	ALTERNATE ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)

Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).
----------------------	--

4.1.31 Federal ID Number

Entity	A4 Invoice Header
Column Name	IIFETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.32 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.33 First Name

Entity	ARM: Insured Detail
Column Name	IRFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.34 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.35 handled by adjustor code

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

5

4.1.36 handled by company identifier

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

4.1.37 handling for adjustor code

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adtr_cde

Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handling for adjustor coder is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.38 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier:
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.39 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	IICLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.40 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO

Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.41 Invoice Number

Entity	A4 Invoice Header
Column Name	IIINNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.42 Item Amount

Entity	A4 Invoice Detail
Column Name	I2IT\$\$
Label Name	Item Amount
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

5

4.1.43 Item Description

Entity	A4 Invoice Detail
Column Name	I2ITDS
Label Name	Item Description
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.44 Item Quantity

Entity	A4 Invoice Detail
Column Name	I2ITQY
Label Name	Item Quantity
System Name	
Data Type	DECIMAL(5)
Attribute Definition	

4.1.45 Item Rate

Entity	A4 Invoice Detail
Column Name	I2ITRT
Label Name	Item Rate
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

5

4.1.46 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.47 Last Name

Entity	ARM: Insured Detail
Column Name	IRLSNM
Label Name	Last Name

System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.48 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.49 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

5

4.1.50 Max \$ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$MAX
Label Name	Max \$ Covered
System Name	
Data Type	DECIMAL(9,2)

Attribute Definition	
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4.1.51 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.52 Number Of Days Authorized

Entity	ARM: Authorization(Claim Info)
Column Name	AZAUDY
Label Name	Number Of Days Authorized
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

5

4.1.53 Record Add Date

Entity	A4 Invoice Header
Column Name	IIADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.54 related office identifier

Entity	ACTION ITEM
--------	-------------

Column Name	rel_ofc_id
Label Name	related office identifier:
System Name	RELOFCID
Data Type	DEC(11,0)
Attribute Definition	The related office identifier is the identifier of the office responsible for the action item.

4.1.55 Remittance Reference

Entity	A4 Remit Reference No.
Column Name	Q5RMNO
Label Name	Remittance Reference #
System Name	
Data Type	NUMERIC(6)
Attribute Definition	

4.1.56 Request Type

Entity	ACTION ITEM TYPE
Column Name	XURSTP
Label Name	Request Type
System Name	XURSTP
Data Type	CHAR(1)
Attribute Definition	The request type is a code from the ARMS system which identifies whether adjustor action is necessary for an authorization and what type of action.

5

4.1.57 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date

System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.58 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.59 Status Code

Entity	ACTION ITEM TYPE
Column Name	XUSTCD
Label Name	Status Code
System Name	XUSTCD
Data Type	CHAR(1)
Attribute Definition	The status code is a code from the ARMS system which identifies whether an authorization is a reservation, a ticket, unauthorized, invoiced, paid, etc.

5

4.1.60 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)

Attribute Definition	
----------------------	--

4.1.61 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	13BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.62 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	13RC\$\$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

5

4.1.63 Total Billed to Others

Entity	A4 Invoice Trailer
Column Name	13OT\$\$
Label Name	Total Billed to Others
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.64 Total Ticket Charges

Entity	A4 Invoice Trailer
--------	--------------------

Column Name	13TO\$\$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.65 Vehicle Rate

Entity	ARM: Authorization(Claim Info)
Column Name	AZVHRT
Label Name	Vehicle Rate
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

4.1.66 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

5

5. Questions and Answers

Issue Number: 256

10

Question: The calculation for authorized limit when displaying the invoice detail does not take bill to percent into account when all the following conditions are true:

Policy Maximum = 0

Policy Daily > 0

Vehicle Rate > 0

Vehicle Rate < Policy Daily

5 or all the following conditions are true:

Policy Maximum > 0

Policy Daily = 0

Vehicle Rate > 0

10 In all other cases, the amount is multiplied by the bill to percent to get the authorized limit. Is this calculation correct?

Status: Pending

15 **Resolution:** 3-14-00, DSE-Need to follow up with author to get a further understanding of question.

3-23-00, Issue Mtg., Will get addressed in current state and fix.

Issue Number: 257

20 **Question:** This is a presentation issue. The adjuster name on the invoice detail screen will not show up in certain cases. This code is in the *INZSR sub routine and needs some investigation of scenarios to determine the exact flaw.

Status: Closed - Resolved

25 **Resolution:** 3-14-00, DSE-Need to follow up with author to get a further understanding of question.

Functional Design Specification

30 **Pay Approved Invoices**
(Processor Pay)

Version 1.0

1. Pay Approved Invoices Use Case

1.1 Brief Description

5 The Pay Approved Invoices use case describes how the PROCESSOR would review and pay invoices in the ARMS Web system.

1.2 Use Case Actors

The following actors will interact with this use case:

- 10
- **PROCESSOR** – The PROCESSOR will use this use case to pay approved invoices.

1.3 Pre-Conditions

- 15
- The PROCESSOR must be logged into the ARMS Web system.
 - The PROCESSOR'S office must be set up to handle processor payment of invoices.
 - The PROCESSOR must be authorized to handle invoices.

1.4 Flow of Events

20 The Flow of Events will include the necessary steps for a PROCESSOR to review and pay invoices.

1.4.1 Activity Diagram - see Figure 136

25 1.4.2 Basic Flow

1. The PROCESSOR will view their payment list.
 2. The system will check to see if the PROCESSOR'S office is set up for individual payment or bulk payment.
 - If the PROCESSOR'S office is set up for individual payment execute subflow 1.4.2.1, Individual Pay.
 - If the PROCESSOR'S office is set up for bulk payment execute subflow 1.4.2.2, Bulk Pay.
- 30

1.4.2.1 Individual Pay

1. The system will display instructions for paying the invoices individually and a summary list of all the invoices on the PROCESSOR'S payment list.
2. For each invoice on the payment list, the PROCESSOR may enter the associated check number.
3. The PROCESSOR will submit the invoices to the system.
4. The system will mark the invoices paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.2.2 Bulk Pay

1. The system will display instructions for paying the invoices in bulk and a summary list of all the invoices on the PROCESSOR'S payment list.
2. The ADJUSTER may enter the check number of the check that is paying all the invoices on the payment list.
3. The PROCESSOR will submit the invoices to the system.
4. The system will mark the invoices paid.
5. The system will update the ARMS Web database.
6. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 View Customer File

At step one of Section 1.4.2.1, Individual Pay, or Section 1.4.2.2, Bulk Pay, the PROCESSOR may choose to view detail information about the rental. The view rental detail process is executed using extension point MA-19 – View Customer File.

1.4.3.2 Return an Invoice

At step one of Section 1.4.2.1, Individual Pay or Section 1.4.2.2, Bulk Pay the PROCESSOR may choose to return any invoice to

the ADJUSTER. The PROCESSOR may enter a message to explain why they returned the invoice. The returned invoice should be given a status of returned invoice. The invoice will then become an action item for the owning ADJUSTER to review and correct.

5

1.4.3.3 Print an Invoice List

At step one in section 1.4.2.1, Individual Pay, or section 1.4.2.2, Bulk Pay, the PROCESSOR may choose to print the invoice list of all invoices on the Payment List. If they so choose, they may also print the rental history for all invoices. The system will display a printer friendly screen and the PROCESSOR will choose to print via their browser window. Upon printing, the PROCESSOR will return to the step one of section 1.4.2.1 if the PROCESSOR is set up for Individual Pay, or section 1.4.2.2 if the PROCESSOR is set up for Bulk Pay.

10

15

1.5 Post-Conditions

- If the use case was successful the accepted invoices should be marked as paid in the ARMS Web system.
- If the use case was unsuccessful, the system state is unchanged.

20

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

25

1.6.1 ARMS Web Routes Invoices

Before an ADJUSTER receives an invoice to be approved, the ARMS Web system will look at the invoicing criteria for the owning office and owning adjuster and make a determination as to whether the invoice is auto approved or adjuster approved. If an invoice is auto approved, the

30

invoice will always be assigned to a processor for payment without it ever being sent to an adjuster for approval.

1.6.2 *Data Fields to Assist with Future Releases or Customer Integration*

5 It must be possible to capture the following information at some point in the future because of either planned future releases or customer integration.

- Amount Being Paid on Each Invoice

10 1.6.3 *Claim Number is Editable on the Invoice*

If a company is set up for EDI transmission of invoices to the company's claim system, that company must have the ability to change the claim number on the invoice.

15 1.7 **Extension Points**

1.7.1 *MA-19-View Customer File*

The View Customer File Functional Specification is used to review the rental history in regards to a specific rental. Upon completion of the View Customer File Functional Specification, the ADJUSTER should be
 20 returned to step one of Section 1.4.2.1, Individual Pay, or Section 1.4.2.2, Bulk Pay in the Handle Unapproved Invoices Functional Specification.
 Any previously approved invoices should still be approved in the system.

2. **Screen Design**

25 A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 **Invoicing - Individual Payment List**

30 This screen will allow the user to enter a check number for each invoice and notify Enterprise that they have processed the payment.

2.1.1 *Individual Payment List* - see Figure 137

2.1.2 Individual Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID + ECARS Ticket number. This field is repeated for each invoice in the payment list.
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	15,2	Total amount due from Ins. Company	Total Amount Due	Total Charges – Amount Received This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	First Name + Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list. Count
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	This claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Remit to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Enter the check number of your payment here:	Input	20	Check Number	check number	This field is repeated for each invoice in the payment list.

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.1.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.1.3.3 PAY LATER

When clicked, the user will be returned to their action item list and the payment list will remain unprocessed.

2.1.3.4 RETURN TO ADJUSTER

When clicked, the invoice will be returned to the last adjuster associated with the rental before it closed. The invoice will be removed from the list displayed.

5

2.1.3.5 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

10 2.2 Bulk Payment List

This screen will allow the user to pick which functions that he/she may want to change.

2.2.1 Screen Layout - Bulk Payment List - see Figure 138

15

2.2.2 Invoicing - Bulk Payment List

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	Will be pre-filled with claim number currently on authorization. This field is repeated for each invoice in the payment list.
Invoice Date	Output	10	Invoice Date (ECARS Ticket Date)	Record Add Date	This field is repeated for each invoice in the payment list.
Please include this reference number on your check:	Output	20	Invoice ID	Invoice Number	Rental Group ID + Rental Branch ID + ECARS Ticket number. This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Invoice:	Output	20	Invoice Id	Invoice Number	Rental Group Id + Rental Branch Id + ECARS Ticket Number. This field is repeated for each invoice in the payment list.
Federal ID	Output	30	Location's Federal ID	Federal ID Number	This field is repeated for each invoice in the payment list.
Total Amount:	Output	152	Total amount due from Ins. Company	Total Amount Due	Total Charges – Amount Received. This field is repeated for each invoice in the payment list.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Insured's Name	Last Name	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
	Output	12	Rental Location Telephone Number	Telephone Number	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City, State and Zip Code	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing City State and Zip	City + State + Zip Code	This field is repeated for each invoice in the payment list.
	Output	30	Rental Location's Mailing Street Address	Address Line + Address Line2	This field is repeated for each invoice in the payment list.
Date of loss	Output	10	Date of loss	Date Of Loss	This field is repeated for each invoice in the payment list.

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Invoice	Output	5	Invoice List Number	CALCULATED	This field is repeated for each invoice in the payment list.
Claim type	Output	10	Claim Type	claim type description	This field is repeated for each invoice in the payment list.
Claims Office:	Output	3	Office Id	external organization abbreviated name	This claims office id which the user is currently process work for.
Vehicle Condition	Output	10	Loss Type	loss type description	This field is repeated for each invoice in the payment list.
Remit to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Send Payment to:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.
Rental:	Output	30	Rental Location's Accounting Name	accounting name	This field is repeated for each invoice in the payment list.

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 PRINTER FRIENDLY PAGE

When clicked, the user will be taken to the "Printer Friendly View" of the current invoice.

2.2.3.2 CONFIRM PAYMENT

When clicked, system will mark the reservation as paid and update the database. The update will be passed to the Arms system.

2.2.3.3 PAY LATER

When clicked, the user will be returned to their action item list and the payment list will remain unprocessed.

5 2.2.3.4 RETURN TO ADJUSTER

When clicked, the invoice will be returned to the last adjuster associated with the rental before it closed. The invoice will be removed from the list displayed.

10 2.2.3.5 Top of Page

When clicked, the user will be taken to the top of the current invoice page.

2.3 Return Invoice to Adjuster

15 2.3.1 Screen Layout - *returnBilling.shtml* - see Figure 139

2.3.2 Return Billing

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Input	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Total Amount Due from Ins. Company	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Adjuster's last name + adjuster's first name
Comments	Input	50	Reason Comments	NOTE	
Renter Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason For Return	ComboBox	50	Reason For Return	standard message description	

2.3.3 Screen Function Definition

20 This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen from which they came.

5 The invoice will still be displayed with the status of the invoice unchanged.

2.3.3.2 Return to Adjuster

When clicked, the user will return the invoice to the Adjuster for further instructions and the status will show returned invoice.

10

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

15

3.1 Get Approved Invoices (Office Id)

The get approved invoices operation finds all the approved invoices for the specified office.

20

3.2 Get Invoice Detail (Invoice Number)

The get invoice detail operation gets the relevant invoice information for the specified invoice number.

25

3.3 Return Invoice to Approving Adjuster (Invoice Number, Reason Code)

The return invoice to approving adjuster operation marks the specified invoice so that the approving adjuster can review the invoice and re-approve it.

3.4 Pay Invoice (Invoice Number, Check Number)

The pay invoice operation records the check number specified by the adjuster against the specified invoice and marks the invoice as paid.

30

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

5 4.1.1 *accounting name*

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2 *action item complete date*

Entity	ACTION ITEM
Column Name	actn_item_cmpl_dte
Label Name	action item complete date:
System Name	AITMCMPLDT
Data Type	DATE
Attribute Definition	The action item complete date is the date the action item was completed by an administrator or adjustor.

4.1.3 *action item effective date*

Entity	ACTION ITEM
Column Name	actn_item_eff_dte
Label Name	action item effective date:
System Name	AITMEFFDT
Data Type	DATE
Attribute Definition	The action item effective date is the date the action item will become effective.

4.1.4 action item status code

Entity	ACTION ITEM
Column Name	actn_item_stat_cde
Label Name	action item status code:
System Name	
Data Type	CHAR(6)
Attribute Definition	The action item status code defines the status of this action item. For example:

4.1.5 action item type code

Entity	ACTION ITEM
Column Name	actn_item_typ_cde
Label Name	action item type code:
System Name	
Data Type	DEC(3,0)
Attribute Definition	The action item type code defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an insured with a replacement vehicle. For example: Closing an Of

5

4.1.6 action item type description

Entity	ACTION ITEM TYPE
Column Name	actn_item_typ_dsc
Label Name	action item type description:
System Name	
Data Type	CHAR(40)

Attribute Definition	The action item type description is a lexical definition of an action item type code which defines specific tasks/action items associated with the Rental Authorization/Reservation activities accomplished by adjustors and administrators when contracting an
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4.1.7 Address Line

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.8 Address Line2

Entity	ARM: Rental Location Master
Column Name	LOADL2
Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

5

4.1.9 ARMS Profile ID

Entity	ACTION ITEM
Column Name	ALCUID
Label Name	ARMS Profile ID
System Name	
Data Type	CHAR(5)

Attribute Definition	The ARMS Profile ID is the company identifier used to uniquely define an authorization.
----------------------	---

4.1.10 assigned to adjustor code

Entity	ACTION ITEM
Column Name	assgn_to_adjr_cde
Label Name	Adjustor Code
System Name	AADJRCDE
Data Type	CHAR(10)
Attribute Definition	The assigned to adjustor code is the adjustor code of the administrator or adjustor's who is assigned the action item.

4.1.11 assigned to company identifier

Entity	ACTION ITEM
Column Name	assgn_to_cmpy_id
Label Name	ARMS Profile ID
System Name	ACMPYID
Data Type	CHAR(5)
Attribute Definition	The assigned to company identifier is the company identifier of the administrator or adjustor's who is assigned the action item.

5

4.1.12 Bill To %

Entity	ARM: Authorization(Claim Info)
Column Name	AZBTPC
Label Name	Bill To %
System Name	
Data Type	DECIMAL(3)
Attribute Definition	

4.1.13 Branch

Entity	A4 Cross Reference
Column Name	br_id
Label Name	Branch:
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.14 check number

Entity	RENTAL INVOICE PAYMENT
Column Name	chk_nbr
Label Name	check number:
System Name	CHKNBR
Data Type	DEC(11,0)
Attribute Definition	

5

4.1.15 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.16 claim type description

Entity	CLAIM TYPE
Column Name	clm_typ_dsc
Label Name	claim type description:

System Name	CLMTYPDSC
Data Type	CHAR(40)
Attribute Definition	The claim type description is a lexical definition of the claim type code which defines the different Authorization claim types. For example: Insured, Claimant, Uninsured Motorist, etc.

4.1.17 company identifier

Entity	EXTERNAL ORGANIZATION
Column Name	cmpy_id
Label Name	company identifier:
System Name	CMPYID
Data Type	DEC(11,0)
Attribute Definition	Business Party Identifier is a surrogate key assigned to each unique occurrence of an Individual, External Organization, and Internal Organization (Business Party).

4.1.18 company structure level code

Entity	ACTION ITEM
Column Name	cmpy_strct_lvl_cde
Label Name	company structure level code:
System Name	CMPYSLVLCD
Data Type	DEC(3,0)
Attribute Definition	The external organization structure level code identifies the kind or type of internal organizations of the external organizations which Enterprise Rent-A-Car does business with. Such as: Corporation, Branch Claims Office, Region, Area, Subregion, etc.

5

4.1.19 Customer Transaction ID

Entity	ACTION ITEM
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Column Name	AZCUTI
Label Name	Customer Transaction ID
System Name	
Data Type	CHAR(20)
Attribute Definition	The Customer Transaction ID is the authorization transaction identifier which along with a company identifier uniquely define an authorization.

4.1.20 Date Of Loss

Entity	ARM: Renter Detail
Column Name	RKLSDT
Label Name	Date of Loss
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.21 Dollars Per Day Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$PDY
Label Name	Dollars Per Day Covered
System Name	
Data Type	DECIMAL(5,2)
Attribute Definition	

5

4.1.22 End Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZENDT
Label Name	End Date

System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.23 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

4.1.24 external organization identifier

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_id
Label Name	external organization identifier:
System Name	EOID
Data Type	DEC(11,0)
Attribute Definition	The external organization identifier is a surrogate key assigned to each unique occurrence of an External Organization. Examples: body shops, vehicle manufacturers, insurance companies, leasing accounts, credit unions, dealerships, or governing agencies.

5

4.1.25 Federal ID Number

Entity	A4 Invoice Header
--------	-------------------

Column Name	I1FETX
Label Name	Federal ID Number
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.26 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.27 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

5

4.1.28 Group

Entity	A4 Cross Reference
Column Name	grp_id
Label Name	Group Number
System Name	
Data Type	CHAR(2)

Attribute Definition	
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4.1.29 *handled by adjustor code*

Entity	ACTION ITEM
Column Name	handl_by_adjr_cde
Label Name	Adjustor Code
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handled by adjustor code is the adjustor code of the administrator or adjustor's who is handling the action item.

4.1.30 *handled by company identifier*

Entity	ACTION ITEM
Column Name	handl_by_cmpy_id
Label Name	ARMS Profile ID
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handled by company identifier is the company identifier of the administrator or adjustor's who is handling the action item.

5

4.1.31 *handling for adjustor code*

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_adtr_cde
Label Name	handling for adjustor code:
System Name	HNDADJRCDE
Data Type	CHAR(10)
Attribute Definition	The handling for adjustor coder is the adjustor code of an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.32 handling for company identifier

Entity	AUTHORIZATION ACTIVITY LOG
Column Name	handl_for_cmpy_id
Label Name	handling for company identifier:
System Name	HNDCMPYID
Data Type	CHAR(5)
Attribute Definition	The handling for company identifier is the company identifier used to uniquely identify an adjustor/user who is handling authorization activities for another adjustor/user in the ARMS Web application.

4.1.33 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	I1CLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.34 Insurance Claim Number

Entity	ARM: Authorization(Claim Info)
Column Name	AZCLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.35 Invoice Number

Entity	A4 Invoice Header
Column Name	I1INNO
Label Name	Invoice Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.36 Item Amount

Entity	A4 Invoice Detail
Column Name	I2IT\$\$
Label Name	Item Amount
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

5

4.1.37 Item Description

Entity	A4 Invoice Detail
Column Name	I2ITDS
Label Name	Item Description
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.38 Item Quantity

Entity	A4 Invoice Detail
Column Name	I2ITQY
Label Name	Item Quantity

System Name	
Data Type	DECIMAL(5)
Attribute Definition	

4.1.39 Item Rate

Entity	A4 Invoice Detail
Column Name	I2ITRT
Label Name	Item Rate
System Name	
Data Type	DECIMAL(7,2)
Attribute Definition	

4.1.40 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.41 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.42 loss type description

Entity	LOSS TYPE
Column Name	loss_typ_dsc
Label Name	loss type description:
System Name	LOSSTYPDSC
Data Type	CHAR(40)
Attribute Definition	The loss type description is a lexical definition of the loss type code which defines the different loss categories when an Insurance Company authorizes a Rental. For example: Theft, Drivable, Repairable, Non-drivable, Non-repairable, Totaled.

4.1.43 Max \$ Covered

Entity	ARM: Authorization(Claim Info)
Column Name	AZ\$MAX
Label Name	Max \$ Covered
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

5

4.1.44 NOTE

Entity	ARM: ARMS/400 Diary Notes File
Column Name	NENOTE
Label Name	NOTE
System Name	
Data Type	CHAR(50)
Attribute Definition	

4.1.45 Record Add Date

Entity	A4 Invoice Header
--------	-------------------

Column Name	I1ADDT
Label Name	Record Add Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.46 related office identifier

Entity	ACTION ITEM
Column Name	rel_ofc_id
Label Name	related office identifier:
System Name	RELOFCID
Data Type	DEC(11,0)
Attribute Definition	The related office identifier is the identifier of the office responsible for the action item.

4.1.47 Request Type

Entity	ACTION ITEM TYPE
Column Name	X4RSFG
Label Name	Request Type
System Name	
Data Type	CHAR(1)
Attribute Definition	

5

4.1.48 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC

Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

4.1.49 Start Date

Entity	ARM: Authorization(Claim Info)
Column Name	AZSTDT
Label Name	Start Date
System Name	
Data Type	NUMERIC(8)
Attribute Definition	

4.1.50 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

5

4.1.51 Status Code

Entity	ACTION ITEM TYPE
Column Name	XUSTCD
Label Name	Status Code
System Name	XUSTCD
Data Type	CHAR(1)

Attribute Definition	The status code is a code from the ARMS system which identifies whether an authorization is a reservation, a ticket, unauthorized, invoiced, paid, etc.
----------------------	---

4.1.52 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.53 Ticket Number

Entity	A4 Cross Reference
Column Name	X4TKNO
Label Name	Ticket Number
System Name	
Data Type	CHAR(6)
Attribute Definition	

5

4.1.54 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.55 Total Amount Received

Entity	A4 Invoice Trailer
Column Name	I3RC\$\$
Label Name	Total Amount Received
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.56 Total Billed to Others

Entity	A4 Invoice Trailer
Column Name	I3OT\$\$
Label Name	Total Billed to Others
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

5

4.1.57 Total Ticket Charges

Entity	A4 Invoice Trailer
Column Name	I3TO\$\$
Label Name	Total Ticket Charges
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

4.1.58 Zip Code

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code

System Name	
Data Type	CHAR(9)
Attribute Definition	

5. Questions and Answers

None.

5 Functional Design Specification

Reject an Invoice

Version 1.0

10 1. Reject An Invoice Use Case

1.1 Brief Description

The Reject an Invoice use case describes how the ADJUSTER would reject an invoice to Enterprise in the ARMS Web system.

15

1.2 Use Case Actors

The following actors will interact with this use case:

- **ADJUSTER** – The ADJUSTER will use this use case to reject an invoice.

20 1.3 Pre-Conditions

- The ADJUSTER'S office must be set up for individual approval of invoices.
- The ADJUSTER must be set up to approve invoices.

25 1.4 Flow of Events

The Flow of Events will include the necessary steps for an ADJUSTER to reject invoices.

1.4.1 Activity Diagram - see Figure 140

1.4.2 Basic Flow

1. The ADJUSTER will reject an invoice.
2. The system will prompt for reject confirmation.
- 5 3. The ADJUSTER will enter a reject reason for rejecting the invoice.
4. The ADJUSTER may enter comments to be added to the diary notes.
5. The ADJUSTER will submit the rejection to the system.
- 10 6. The system will display instructions for achieving resolution on the rejected invoice.
7. The ADJUSTER will acknowledge that they understand the instructions.
8. The system will update the ARMS Web database to reflect that the ADJUSTER rejected the invoice.
- 15 9. This ends the use case.

1.4.3 Alternative Flows

1.4.3.1 Cancel Rejection

20 At steps two through seven of the Basic Flow, the ADJUSTER must have the ability to cancel the invoice rejection process. Canceling the rejection should return the ADJUSTER to the Invoicing Approval Screen or the Invoicing Individual Payment screen. The invoice that was to be rejected should be displayed. The status of the invoice should be unapproved.

25

1.4.3.2 No Reject Reason Given

30 At step three in the Basic Flow; if the ADJUSTER attempts to bypass entering a reject reason, they will be prompted to enter one. The ADJUSTER will not be allowed to complete the rejection process without providing a reject reason.

1.4.3.3 Short Pay

If the reject reason given in step three of the Basic Flow is a reason that requires a short pay, at step five of the Basic Flow the system will display a field for entry of the short pay amount. The ADJUSTER will not be allowed to complete the rejection process without providing an amount that will be paid.

1.5 Post-Conditions

- If the use case was successful the invoice will be marked rejected in the ARMS Web system.
- If the use case was unsuccessful, the status remains unchanged.

1.6 Special Requirements

The additional requirements of the business use case are included here. These are requirements not covered by the flow as they have been described in the sections above.

1.6.1 *Invoices are Initially Auto Approved*

If an ADJUSTER'S invoices are normally auto approved, functionality needs to exist to route invoices to them when they are returned to ADJUSTER from the PROCESSOR. This functionality will need to override the normal routing processes that exist at the office.

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Reject Billing Reason

This screen will allow the user to begin the rejection process.

2.1.1 Screen Layout – Reject Billing Reason - see Figure 141

2.1.2 Reject Billing - Reject Billing Reason

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Amount	Output	10	Total Amount Due	CALCULATED	
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned
Comments	Input	50	Message Text	NOTE	
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
Reason for Rejection	List Box	20	Rejection Reasons	standard message description	

5

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

10

2.1.3.1 CONTINUE

The system will validate the input from the screen according to the listed business rules. If the validation passes, the rejection process will continue.

15

The following business rules that must be passed before the USER may continue to the next step in the rejection process are the following:

- A valid rejection reason must be selected from the drop down box

20

- If the rejection reason selected is “Other” a comment must be entered

2.1.3.2 CANCEL

5 When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

2.2 Reject Billing Amount

10 2.2.1 Screen layout - Reject Billing Amount - see Figure 142

2.2.2 Reject Billing - Reject Billing Amount

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Claim Number	Output	15	Claim Number	Insurance Claim Number	
Amount	Output	15,2	Invoice Amount	Total Amount Due	
Adjuster's Name	Output	30	Adjuster's Name	First Name + Last Name	Name of adjuster's to which the invoice is assigned.
Handling For:	Output	30	Handling for Adjuster's Name	First Name + Last Name	Adjuster's First name + Adjuster's last name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	User's Name	First Name + Last Name	Adjuster's last name + Adjuster's first name. The name of the adjuster to which the invoice is currently assigned.
	Output	30	Rental Location Address	Address Line + Address Line2	
	Output	30	Rental Location City, State and Zip	City + State + Zip Code	
	Output	15	Rental Location Telephone Number	Telephone Number	

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Renter's Name	Output	30	Renter's name	First Name + Last Name	Renter's Last Name + Renter's First Name
To complete this process, please contact the Enterprise Branch listed below:	Output	50	Rental Location Accounting Name	accounting name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 REJECT INVOICE

The system will validate the input from the screen. If the validation passes, the invoice will be marked as rejected and the Arms Web database will be updated. If an amount was entered in the "Amount you are paying" field, then the invoice should be marked short paid.

2.2.3.2 CANCEL

When clicked, the user will be returned to the Invoicing Approval or Invoicing Individual Payment screen. The invoice will still be displayed with the status of the invoice unchanged.

3. Application Operations

This section will detail all the application operations that are part of this Functional Specification Document.

3.1 Get Invoice Rejection Reasons (Company Id)

The get invoice rejection reasons gets the predefined rejection reasons for the company.

3.2 Reject Invoice (Invoice Number)

The reject invoice operation marks the specified invoice as rejected. The rejected invoice becomes an action item for the adjuster to handle.

5

4. Data Fields

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

10

4.1.1 *accounting name*

Entity	OFFDRB OFFICE DIRECTORY BRANCH MASTER
Column Name	acctg_nam
Label Name	Accounting Name
System Name	
Data Type	VARCHAR(8)
Attribute Definition	

4.1.2 *Address Line*

Entity	ARM: Rental Location Master
Column Name	LOADL1
Label Name	
System Name	
Data Type	CHAR(30)
Attribute Definition	

15

4.1.3 *Address Line2*

Entity	ARM: Rental Location Master
Column Name	LOADL2

Label Name	Address Line
System Name	
Data Type	CHAR(30)
Attribute Definition	

4.1.4 City

Entity	ARM: Rental Location Master
Column Name	LOCYNM
Label Name	City
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.5 external organization abbreviated name

Entity	EXTERNAL ORGANIZATION
Column Name	e_o_abbr_nam
Label Name	external organization abbreviated name:
System Name	EOABBRNAM
Data Type	CHAR(10)
Attribute Definition	External Organization Abbreviated Name is a shortened text based label associated with an organization outside of Enterprise. This name is sometimes used for accounting purposes.

5

4.1.6 First Name

Entity	ARM: Adjustor Master
Column Name	ALFSNM
Label Name	First Name
System Name	

Data Type	CHAR(15)
Attribute Definition	

4.1.7 First Name

Entity	ARM: Renter Detail
Column Name	RKFSNM
Label Name	First Name
System Name	
Data Type	CHAR(15)
Attribute Definition	

4.1.8 Insurance Claim Number

Entity	A4 Invoice Header
Column Name	I1CLNO
Label Name	Insurance Claim Number
System Name	
Data Type	CHAR(20)
Attribute Definition	

5

4.1.9 Last Name

Entity	ARM: Adjustor Master
Column Name	ALLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.10 Last Name

Entity	ARM: Renter Detail
Column Name	RKLSNM
Label Name	Last Name
System Name	
Data Type	CHAR(20)
Attribute Definition	

4.1.11 standard message description

Entity	STANDARD MESSAGE
Column Name	std_msg_dsc
Label Name	standard message description:
System Name	STDMSGDSC
Data Type	CHAR(50)
Attribute Definition	The standard message description is a lexical definition for standard message code which defines a predefined message which is applicable to specific activity type codes. For example: "Authorization confirmed on &Date with Reservation Number &Resnumber"

5

4.1.12 State

Entity	ARM: Rental Location Master
Column Name	LOSACD
Label Name	State
System Name	
Data Type	CHAR(2)
Attribute Definition	

4.1.13 Telephone Number

Entity	ARM: Rental Location Master
Column Name	LOPHNO
Label Name	Telephone Number
System Name	
Data Type	NUMERIC(10)
Attribute Definition	

4.1.14 Total Amount Due

Entity	A4 Invoice Trailer
Column Name	I3BL\$\$
Label Name	Total Amount Due
System Name	
Data Type	DECIMAL(9,2)
Attribute Definition	

5 *4.1.15 Zip Code*

Entity	ARM: Rental Location Master
Column Name	LOZPCD
Label Name	Zip Code
System Name	
Data Type	CHAR(9)
Attribute Definition	

Functional Design Specification**Callbacks**

Callbacks

1. Callbacks

5 1.1 Brief Description

This use case describes the process that will perform repair facility callbacks in the ARMS Web system. USERS perform repair facility callbacks on each of the rental contracts that are set to expire in the near future (or have already expired), to proactively determine if rentals must be extended due to slippage in repair facility time estimates. The callback process in the ARMS Web system will retrieve each of the rental contracts that will expire in the user-defined period of time, and organize them by repair facility to allow the USER to make one phone call to inquire about the potentially multiple vehicles that the repair facility is responsible for.

15

1.2 Use Case Actors

All actors will use the use case to retrieve callback lists in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **PROCESSOR**
- 20 • **ADJUSTER**
- **COMPANY MANAGER**

For the balance of this use case, all of the above actors will be referred to as USER.

25 1.3 Pre-Conditions

- The USER must be signed-on to the system.

1.4 Flow of Events

The Flow of Events includes all the steps necessary to retrieve and manage callbacks in the ARMS Web system.

30

1.4.1 Activity Diagram - see Figure 143

1.4.2 Basic Flow

The **Basic Flow** of the Callbacks use case includes all of the required activities for the USER to successfully generate and perform repair facility callbacks in the ARMS Web system.

- 5 1. The USER selects to perform callbacks from the reporting menu of top navigation.
- 10 2. The system generates a report of all open authorizations for the selected office that will expire the next day (have a last authorized day of tomorrow). This list will include any authorizations that have already expired, or will expire by the end of business on the following day.
- 15 3. The system displays a summary of repair facilities that have rentals expiring in the specified timeframe. The repair facility callback summary must consist of:
 - Repair Facility Name
 - Repair Facility Telephone Number
 - Number of Rental callbacks due to the Repair Facility
- 20 4. The USER selects one or more repair facilities from the repair facility callback summary.
- 25 5. The system displays a summary of the open authorizations that are set to expire for all selected repair facilities. The open authorization callback summary will consist of:
 - Renter Name
 - Year/Make/Model of the Renter's Vehicle
 - Driveable Flag (y/n)
 - Number of Days Behind
 - Authorized Days
 - Last Authorized Day
- 30 6. The USER will select a customer file from the list.
7. The USER will extend into use case MA-12 Extend Authorization. The USER will have the ability to extend, add notes, terminate or

modify an authorization as proscribed in the MA-12 Extend Authorization use case. If callbacks still exist, the USER will be returned to Step 5 of the **Basic Flow** on completion of the MA-12 Extend Authorization use case. If all callbacks have been completed, the **Basic Flow** continues.

8. The system will display a screen to indicate that all repair facility callbacks for the office have been completed.
9. This ends this use case.

1.4.3 *Alternative Flows*

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 *Change Last Authorized Date*

At Step 3 or Step 5 of the **Basic Flow**, the USER has the ability to change the last authorized day to any day in the future. The system will re-generate the callbacks list and the USER will be returned to Step 2 of the Basic Flow on submission of the new last authorized day.

1.4.3.2 *Last Authorized Date Entered Invalid*

In the Change Last Authorized Date **Alternative Flow**, if the last authorized date entered by the USER is invalid, the system will return to the beginning of the Change Last Authorized Date **Alternative Flow** and provide the USER with an error message.

1.4.3.2.1 It will be considered invalid if the last authorized date entered is less than the current date.

1.5 **Post-Conditions**

- If successful, a callback list is created for the USER.
- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

None.

5 1.7 Extension Points

1.7.1 MA-12 Extend Authorization

At Step 7 of the Basic Flow, the USER will extend from the use case to the MA-12 Extend Authorization use case. This will allow the USER to update the open authorization with the results of the repair facility callback (e.g., extend, add notes, or terminate the rental authorization). On completion of the MA-12 Extend Authorization use case, the rules specified within the **Basic Flow** should be followed as to the next step in the process.

15 2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

20 2.1 Repair Facility Callback Summary

This screen provides the USER with a repair facility callback summary, and supports Step 3 of the **Basic Flow**.

2.1.1 Screen Layout - see Figure 144

25

Functional Design Specification

Generate Personal Report

Version 1.11

5

Generate Personal Report

1. Generate Personal Report

10 1.1 Brief Description

This use case describes how a USER would generate a report on their personal rental management activity. Personal reports allow the USER access to reporting on only their own rental management activity, which allows the USER to review their own performance and secures access to the rental management reports of others.

15

1.2 Use Case Actors

All actors will use the use case to generate personal reports in the ARMS Web system. All of the following actors can be defined generically as a USER:

20

- **ADJUSTER**
- **PROCESSOR**
- **COMPANY MANAGER**

For the balance of this use case, all of the above actors will be referred to as USER.

25

1.3 Pre-Conditions

- The USER must be signed-on to the system.

1.4 Flow of Events

30

The Flow of Events includes all the steps necessary to generate personal reports in the ARMS Web system.

1.4.1 Activity Diagram - see Figure 145

1.4.2 Basic Flow

The **Basic Flow** of the Generate Personal Report use case includes all of the required activities for the USER to successfully generate and view a standard personal report in ARMS Web.

1. The USER selects to generate a personal report from the top navigation bar.
2. The system generates the report for the specific USER. The report should provide rental management reports for the signed-in USER. The default report view to display to the USER will be the Open Ticket Detail view (see section 1.6.1 of the Special Requirements section on page 5 for further definition).
3. The system displays the report to the USER.
4. This ends this use case.

1.4.3 Alternative Flows

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided. The **Alternative Flows** are optional and only occur if the conditions specified are met.

1.4.3.1 Change Report View

At Step 3 of the **Basic Flow**, the USER will have the ability to change the report 'view'. (Report views are covered in more detail in Section 1.6 Special Requirements.) Report 'views' change the type of information that is presented to the USER, but maintains the same or similar scope. For example, the USER can select to change to a closed ticket detail view from the open ticket detail view, but the information presented is limited (scoped) to the rental management activity of the USER.

If the USER selects to change the report view, the system will return to Step 2 of the **Basic Flow** and re-generate the report to build the requested view.

5 *1.4.3.2 Change Closed Ticket Date Range*

At Step 3 of the **Basic Flow**, if the current report view is a closed ticket report, the USER will have the ability to change the date range of the report. The available date range for closed ticket reporting will be a rolling 13-month period (to be expanded to 24-months in future releases) with the current month inclusive. The default date range that will be presented to the USER will be the current and previous two (2) months. The USER will have the ability to select Month/Year to begin and end the date range for the closed ticket report. The USER will not have the ability to select specific days within a month as part of the date range.

If the USER selects a new date range for the closed ticket report view, the system will return to Step 2 of the **Basic Flow** and re-generate the report to build the USERs closed ticket report for the selected date range.

20 *1.4.3.3 Select Open Ticket from Open Ticket Detail Report*

At Step 3 of the **Basic Flow**, if the current report view is an open ticket detail report, the USER will have the ability to select a report line item to view the details of the open ticket customer file. When selected, the system will present the USER with the customer file that corresponds to the selected open ticket. The USER will be allowed to modify and submit changes to the customer file (as proscribed in use case MA-13 Change Authorization). Once activity on the customer file is complete, the USER should be returned to the open ticket detail report (Step 3 of the **Basic Flow**).

1.4.3.4 Select Closed Ticket from Closed Ticket Detail Report

At Step 3 of the **Basic Flow**, if the current report view is a closed ticket detail report, the USER will have the ability to select a report line item to view the details of the closed ticket customer file.

5 When selected, the system will present the USER with the closed customer file that corresponds to the selected closed ticket. The USER will be allowed to view/print the details of the closed ticket, but will not have the ability to modify or change the ticket information. From the closed customer file, the USER will be
10 returned to the closed ticket detail report (Step 3 of the **Basic Flow**).

1.4.3.5 Sort Report

At Step 3 of the **Basic Flow**, the USER will have the ability to
15 select any report column heading to have the report sorted by the selected column. If the USER selects a column heading, the system must sort the report by the selected column heading in ascending order. The USER will have the ability to toggle
20 between ascending and descending sort order by re-selecting the currently sorted column. For example, if the USER wanted their report view to be sorted by *Renter Name*, clicking on the column would cause the report view to be sorted ascending by renter last name. If the USER would like to reverse the sort order to
25 descending, selecting the column heading again would allow the report to be resorted descending by renter last name.

The system will return the USER to Step 3 of the **Basic Flow** on
completion of this **Alternative Flow**, with the report view resorted
according to the USER request.
30

1.4.3.6 Add/Edit Custom View

At Step 3 of the **Basic Flow**, the USER will have the ability to add or edit a custom report view. If the USER selects to add a report

view, the system will extend to the RP-03 Add/Edit Custom View use case to define a new custom report layout.

5 If the USER is viewing a custom report, they will have the ability to edit the custom view by selecting an 'edit' option. When a user requests to edit a custom report layout, the system will extend to the RP-03 Add/Edit Custom View use case and pre-fill all corresponding fields with the currently selected parameters for the custom layout.

10 On completion of the use case extension, the USER will be returned to Step 2 of **Basic Flow** in this use case and be presented with the custom report layout that was defined/modified.

15 1.4.3.7 Select Download Report

At Step 3 of the **Basic Flow**, the USER will have the ability to download the current report view to a comma-delimited file. If the USER selects to download a comma-delimited version of the report, the system must publish a comma-delimited file that includes all of the data within the columns of the current report view. The comma-delimited file should include column headings for each of the columns of data provided to the USER. The comma-delimited file must also include report header information that includes:

- 25
- Report View (open ticket detail/closed ticket detail)
 - Name of the Adjuster
 - Date and time the report was generated

The system should return the USER to the report view (Step 3 of the **Basic Flow**) once a report has been successfully downloaded.

30

1.5 Post-Conditions

- If successful, a standard report is created for the USER.

- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

5 The special requirements for this use case define all of the personal report 'views' that are available to the USER. This list of personal report views may be expanded at a later date to include additional information from the ARMS/400 reporting detail files, but only these views are anticipated for the initial release.

1.6.1 Open Ticket Detail View

10 The Open Ticket Detail View provides the USER with columns of data on all currently open tickets under their management. The Open Ticket Detail report will display the following information to the user:

1. Renter Name
2. Claim Number
- 15 3. Claim Type
4. Authorized Rate*
5. Authorized Days*
6. Rental Days*
7. Number of Days Behind*
- 20 8. Number of Extensions*
9. Surcharges (Y/N)
10. Authorized Amount*

Specific rules that must apply to the Open Ticket Detail report view are outlined in the sections below;

25

1.6.1.1 Data Columns in the Open Ticket Detail View should be presented in the order defined above. For example, renter name belongs in column 1 of the Open Ticket Detail report.

30

1.6.1.2 All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk () in the list above.*

1.6.1.3 The default sort for the Open Ticket Detail view must be by the Number of Days Behind field, with open tickets that are the farthest behind presented at the top of the list.

5 *1.6.1.4 Any open tickets that have a value greater than zero (0) in the Number of Days Behind field should be highlighted to the USER.*

1.6.1.5 The report must include a count of the total number of contracts in the list.

10 *1.6.1.6 The report view must include report header information (in both screen and downloaded versions) that includes:*

- the type/view of report (open ticket detail)
- the name of the USER for whom the report was generated
- the date/time the open ticket report was generated

15

1.6.2 Closed Ticket Detail View

20 The Closed Ticket Detail View provides the USER with columns of data on closed ticket activity for the currently selected date range (the default date range is the current plus previous two (2) months). The Closed Ticket Detail report will display the following information to the user:

1. Renter Name
2. Claim Number
- 25 3. Claim Type
4. Authorized Rate*
5. Authorized Days*
6. Billed Days*
7. Number of Extensions*
- 30 8. Total Charges*
9. Amount Received*
10. Billed Amount*

Specific rules that must apply to the Closed Ticket Detail report view are outlined in the sections below;

5 1.6.2.1 Data Columns in the Closed Ticket Detail View should be presented in the order defined above. For example, renter name belongs in column 1 of the Closed Ticket Detail report.

10 1.6.2.2 All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk (*) in the list above.

15 1.6.2.3 The default sort for the Closed Ticket Detail view must be by the *Claim Number* field.

 1.6.2.4 The report must include a count of the total number of contracts in the list.

20 1.6.2.5 The report view must include report header information (in both screen and downloaded versions) that includes:

- the type/view of report view (closed ticket detail)
- the name of the USER for whom the report was generated
- the date/time the open ticket report was generated

25 1.6.3 *Custom Report Views*

The USER will have the ability to define their own custom report views through the RP-03 Add/Edit Custom View use case. These custom views are accessible from the Personal Reporting module of ARMS Web.

30 1.6.4 *Report View Management*

The system will present all of the records in a report result set on a single page, and the USER will scroll through the results to find specific records. Report views will not be presented in paging format (e.g., forcing the USER to review the Next 25 of 427 records).

5

1.7 Extension Points

This section describes the extension points of this use case.

1.7.1 MA-13 Change Authorization

10 If the USER selects a line item from the Open Ticket Detail report view, the USER will extend into the MA-13 Change Authorization use case (see the Select Open Ticket from Open Ticket Detail Report **Alternative Flow** on page 3 for additional detail). The USER will have the ability to make any changes or updates that their security level allows, and have the
15 opportunity to return to this use case without making any changes to the open ticket. On completion of activity in the MA-13 Change Authorization use case, the USER will be returned to Step 3 of the **Basic Flow** within this use case (be presented with the Open Ticket Detail report).

20 1.7.2 RP-03 Add/Edit Custom View

If the USER selects to add or edit a custom view, the USER will extend into the RP-03 Add/Edit Custom View use case (see the Add/Edit Custom View Alternative Flow on page 4 for additional detail). The USER will define or modify their custom report layout and be returned to Step 2 of
25 the **Basic Flow** within this use case.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be
30 used to implement support for the use case flow.

2.1 Personal Report Template Screen

This screen provides the template to build personal report 'views', and supports Step 3 of the **Basic Flow**.

5 2.1.1 Screen Layout - see Figure 146

2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Office	Combo Box		Branch claims office	<p>This combo list should include all of the offices for the currently active company that the USER is assigned to.</p> <p>If the value of this field is changed, the system should automatically refresh the screen with the current report view for the newly selected office.</p>
Handling for	Output Text		Handling for	For personal reports, this value should always be 'Yourself'.
	Output Text		<Report By>	The <report by> field is a placeholder in the header of the report view. For personal reports, this placeholder should be populated with the name of the user that is being reported on (i.e., the name of the user that requested the report).
	Output Text		<Time/Date Stamp>	The <time/date stamp> field is a placeholder in the header of the report view. For personal reports, this placeholder should be populated with the date and time that the report was generated.
	Output Text		<Report Type>	The <report type> field is a placeholder in the header of the report view. For personal reports, this placeholder should be populated with the name of the current report view (e.g., Open Ticket Detail, Custom View 1)

Screen Label	Type	Length	Data Field	Screen Specific Rule
<Column Heading I through X>	Output Text		<Data Columns I through X>	The data columns of the report should correspond to the data columns defined for the selected report view (either static or custom report view). The data columns should be presented in the sequence that they are defined.
Total	Output Text		Number of Customer Files	The total field should include the total number of contracts/ customer files that are represented in the report.
Select a view	Combo Box		Report view selection	<p>The 'select a view' combo box should include the names of all report views that are available to the user. This includes all pre-defined (e.g., Open Ticket Detail) and user-defined custom views.</p> <p>There should be an additional option to 'Add a custom view...'. If selected, the system should redirect the user to the Add/Edit Custom View screen in the RP-03 Add/Edit Custom View specification.</p>

Screen Label	Type	Length	Data Field	Screen Specific Rule
Show Only	Combo Box		Claim Type Filter	<p>The 'show only' combo box should include the following values:</p> <ul style="list-style-type: none"> • All Claim Types (default) • Insured Claim Types • Claimant Claim Types • Uninsured Claim Types • Left Claim Types <p>When selected, the report should filter the records to display in the requested report view according to the selection in this combo box. For example, if the selection in the 'show only' field were 'Insured Claim Types', the report view would only include records that have a Claim Type of 'Insured'.</p>
From	Combo box		Closed ticket report from date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'January 2000'.</p> <p>The default value should be 2 months prior to the current month.</p>

Screen Label	Type	Length	Data Field	Screen Specific Rule
To	Combo box		Closed ticket report to date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'July 2000'.</p> <p>The default value should be the current month.</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Choose a different report

The 'Choose a different report' screen function provides the USER with a hyperlink to the View a Different Report section of the Personal Report Template screen. The 'Choose a different report' screen function must be at or near the header of the report.

2.1.3.2 Go to Report Averages

The 'Go to Report Averages' screen function provides the USER with a hyperlink to the bottom of the report to review the averages for each of the numeric columns in the report view. The 'Go to Report Averages' hyperlink must be at or near the header of the report.

2.1.3.3 Column Heading Sort

The 'Column Heading Sort' screen function allows the USER to click on any column heading and have the current report view sorted by the selected column. On initial selection of a column heading, the system will resort the report view by the column

selected in ascending order. If the sorted column is selected by the USER, the system will resort the report in descending order.

2.1.3.4 Download this report

The 'Download this Report' screen function allows the USER to click on a hyperlink and download a comma-delimited copy of the current report view. The downloaded copy must include:

- Report Header Information
 - Name of the Report View
 - Name of the Person
 - Date and Time that the Report Was generated
- Report View Column Headings
- Report View Records

2.1.3.5 View Report

The 'View Report' screen function allows the USER to submit a request for a different type and/or date range of the report view. The system will refresh the screen with updated report view information when this screen function is invoked.

2.1.3.6 Edit Custom View

The Edit Custom View screen function is available only in cases that the USER has a custom defined view active. If the USER selects the Edit Custom View hyperlink, the system will present the USER with the Add/Edit Custom View screen and pre-populate the screen with the custom view definition. This will allow the USER to edit the custom views that they have previously defined.

See Figures 147(a)-(c).

Generate Management Report

Version 1.11

5

Generate Management Report

1. Generate Management Report

1.1 Brief Description

10 This use case describes how a USER would request and generate management reports using the on-line reporting functionality of ARMS Web. On-line management reports provide real-time access to open and closed ticket information, which provides the management team of our customers with a tool to effectively monitor rental management statistics. Using the on-line reporting functionality, USERS can request and receive summarized and detailed rental management reports on their Office, on Adjusters within an office, or on the Repair Facilities that are trading partners of a particular office.

20 NOTE: The on-line reporting functionality of ARMS Web provides ARMS ticket data only. ARMS and Non-ARMS reporting is available through the monthly L480 report.

1.2 Use Case Actors

25 All actors will use the use case to generate management reports in the ARMS Web system. All of the following actors can be defined generically as a USER:

- **ADJUSTER** – Adjusters may be granted the authority to access management reports in their user profile. (Users may be granted access to management reporting capabilities through their user profile, even if they are not considered ‘managers’ in the ARMS Web system.)
- 30 • **COMPANY MANAGER** – All users that are identified to the system as managers will have access rights to the management reporting functionality.

For the balance of this use case, all of the above actors will be referred to as USER.

1.3 Pre-Conditions

- 5 • The USER must be signed-on to the system.
- The USER must have the authority to access management reports.

1.4 Flow of Events

10 The Flow of Events includes all the steps necessary to generate management reports in the ARMS Web system.

1.4.1 Activity Diagram - see Figure 148

1.4.2 Basic Flow

15 The **Basic Flow** of the Generate Management Report use case includes all of the required activities for the USER to successfully generate and view a management report using the on-line reporting functionality in ARMS Web.

- 20 1. The USER selects to generate a management report from top navigation.
2. The system generates a Closed Ticket Summary report by Adjuster for the USER. Management reporting USERS will have the ability to request additional summary or detail reports for:
 - 25 a. The office as a whole (by Office)
 - b. The adjusters within an office (by Adjuster)
 - c. The repair facilities doing business with a claims office (by Repair Facility)
3. The system displays the report to the USER.
4. This ends this use case.

30

1.4.3 Alternative Flows

The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 Change Report View

5 At Step 6 of the **Basic Flow**, the USER will have the ability to change the report 'view'. (Report views are covered in more detail in Section 1.6 Special Requirements.) Report 'views' change the type of information that is presented to the USER, but maintains the same or similar scope.

10 If the USER selects to change the report view, the system will return to Step 5 of the **Basic Flow** and re-generate the report to build the requested view. NOTE: The USER may also change the **Report By** criteria to request a new report view (e.g., request a report by Adjuster, Office, or Repair Facility).

15 1.4.3.2 Change Closed Ticket Date Range

At Step 6 of the **Basic Flow**, if the current report view is a closed ticket report, the USER will have the ability to change the date range of the report. The available date range for closed ticket reporting will be a rolling 13-month period (to be expanded to 24-
20 months in future releases) with the current month inclusive. The default date range that will be presented to the USER will be the current and previous two (2) months. The USER will have the ability to select Month/Year to begin and end the date range for the closed ticket report. The USER will not have the ability to
25 select specific days within a month as part of the date range.

If the USER selects a new date range for the closed ticket report view, the system will return to Step 5 of the **Basic Flow** and re-generate the report to build the USERs closed ticket report for the
30 selected date range.

This applies to both summary and detail views of closed ticket reports.

1.4.3.3 Select Summary Line Item from Open Ticket Summary Report

At Step 6 of the **Basic Flow**, if the current report view is an open ticket summary report, the USER will have the ability to select a report line item, which will trigger a request for a more detailed report for the selected item. For example, if the current view were an Open Ticket Summary for Adjusters within an office (Open Summary by Adjuster), the USER would have the ability to select an adjuster from the summarized report and review the Open Ticket Detail report for that adjuster. This 'drill-down' capability must be available for all report types (by Office, by Adjuster, by Repair Facility).

If the USER selects a line item from a summary report view, the system will return to Step 5 of the **Basic Flow** and generate the Open Ticket Detail report view for the selected item. From the Open Ticket Detail, the USER will have the ability to return to the Open Ticket Summary or to continue reviewing the Open Ticket Detail report views for each adjuster/repair facility within the office.

1.4.3.4 Select Open Ticket from Open Ticket Detail Report

At Step 6 of the **Basic Flow**, if the current report view is an open ticket detail report, the USER will have the ability to select a report line item to view the details of the open ticket customer file. When selected, the system will present the USER with the customer file that corresponds to the selected open ticket. The USER will be allowed to modify and submit changes to the customer file (as proscribed in use case MA-13 Change Authorization). Once activity on the customer file is complete, the USER should be returned to the open ticket detail report (Step 6 of the **Basic Flow**).

1.4.3.5 Select Summary Line Item from Closed Ticket Summary Report

5 At Step 6 of the **Basic Flow**, if the current report view is a closed ticket summary report, the USER will have the ability to select a report line item, which will trigger a request for a more detailed report for the selected item. For example, if the current view were a Closed Ticket Summary for Repair Facilities within an office (Closed Summary by Repair Facility), the USER would have the ability to select a repair facility name from the summarized report and review the Closed Ticket Detail report for that repair facility. This 'drill-down' capability must be available for all report types (by 10 Office, by Adjuster, by Repair Facility).

If the USER selects a line item from a summary report view, the system will return to Step 5 of the **Basic Flow** and generate the Closed Ticket Detail report view for the selected item. From the 15 Closed Ticket Detail, the USER will have the ability to return to the Closed Ticket Summary or to continue reviewing the Closed Ticket Detail report views for each adjuster/repair facility within the office.

20 1.4.3.6 *Select Closed Ticket from Closed Ticket Detail Report*

At Step 6 of the **Basic Flow**, if the current report view is a closed ticket detail report, the USER will have the ability to select a report line item to view the details of the closed ticket customer file. When selected, the system will present the USER with the closed 25 customer file that corresponds to the selected closed ticket. The USER will be allowed to view/print the details of the closed ticket, but will not have the ability to modify or change the ticket information. From the closed customer file, the USER will be returned to the closed ticket detail report (Step 6 of the **Basic Flow**). 30

1.4.3.7 Sort Report

5 At Step 6 of the **Basic Flow**, the USER will have the ability to select any report column heading to have the report sorted by the selected column. If the USER selects a column heading, the system must sort the report by the selected column heading in ascending order. The USER will have the ability to toggle between ascending and descending sort order by re-selecting the currently sorted column. For example, if the USER wanted their report view to be sorted by *Renter Name*, clicking on the column would cause the report view to be sorted ascending by renter last name. If the USER would like to reverse the sort order to descending, selecting the column heading again would allow the report to be resorted descending by renter last name.

10

15 The system will return the USER to Step 6 of the **Basic Flow** on completion of this **Alternative Flow**, with the report view resorted according to the USER request.

1.4.3.8 Add/Edit Custom View

20 At Step 6 of the **Basic Flow**, the USER will have the ability to add or edit a custom report view. If the USER selects to add a report view, the system will extend to the RP-03 Add/Edit Custom View use case to define a new custom report layout.

25 If the USER is viewing a custom report, they will have the ability to edit the custom view by selecting an 'edit' option. When a user requests to edit a custom report layout, the system will extend to the RP-03 Add/Edit Custom View use case and pre-fill all corresponding fields with the currently selected parameters for the custom layout.

30

On completion of the use case extension, the USER will be returned to Step 5 of **Basic Flow** in this use case and be presented with the custom report layout that was defined/modified.

5 1.4.3.9 *Select Download Report*

At Step 6 of the **Basic Flow**, the USER will have the ability to download the current report view to a comma-delimited file. If the USER selects to download a comma-delimited version of the report, the system must publish a comma-delimited file that includes all of the data within the columns of the current report view. The comma-delimited file should include column headings for each of the columns of data provided to the USER. The comma-delimited file must also include report header information that includes:

- 15 • Report View (open ticket detail/closed ticket detail)
- Name of the Adjuster
- Date and time the report was generated

The system should return the USER to the report view (Step 6 of the **Basic Flow**) once a report has been successfully downloaded.

20

1.5 **Post-Conditions**

- If successful, a standard report is created for the USER.
- If unsuccessful, the system state remains unchanged.

25 1.6 **Special Requirements**

The special requirements for this use case define all of the management report 'views' that are available to the USER. Management reports will be provided two USERS in two ways:

- 30 • 'Standard' reporting views that have been defined by Enterprise at the request of customers
- 'Custom' reporting detail views that allow the USER to define the columns of data that they would like to be present in a report

1.6.1 *Standard Management Reporting Views*

Standard management reporting views are views that have been defined by Enterprise based on the requests of customers. These views will be carried forward in to ARMS Web and are defined in this section.

The table below (see Figure 149) includes the detailed data fields that are available on each of the 'standard' management reports. The columns available in each report have been expanded somewhat over the current state, as the web environment offers more flexibility to provide additional information than the current state green screen application. The sequence of columns that must be presented in each report are indicated using the number 1-10, with fields that are on the screen but not in the primary data table indicated with an 'X'. For example, the first column in the 'Adjuster -- Open Detail' report is the renter name, the second column is the claim number, etc.

1.6.1.1 All numeric fields should have averages provided at the foot of each corresponding column. Numeric fields are indicated with an asterisk () in the list above.*

1.6.1.2 The default sort for the Open Ticket Detail views must be by the Number of Days Behind field, with open tickets that are the farthest behind presented at the top of the list.

1.6.1.3 The default sort for the Closed Ticket Detail views must be by Claim Number.

1.6.1.4 The default sort for the Open Ticket Summary views must be by Adjuster Name (if by Adjuster), Repair Facility Name (if by Repair Facility), or Office Name (if by Office)

1.6.1.5 The default sort for the Closed Ticket Summary views must be by Adjuster Name (if by Adjuster), Repair Facility Name (if by Repair Facility), or Month/Year (if by Office)

5 *1.6.1.6 Any items in an Open Ticket Detail view that have a value greater than zero (0) in the Number of Days Behind field should be highlighted to the USER.*

10 *1.6.1.7 All report views must include a count of the total number of contracts listed.*

1.6.1.8 The report view must include report header information (in both screen and downloaded versions) that includes:

- 15 • the type/name of the report view (e.g., open ticket detail, open ticket summary)
- the name of the entity that is being reported on. For summary views, this should always be the office name. For detail views, the entity name must be:
 - 20 ○ the adjuster name (for reports by Adjuster)
 - the office name (for reports by Office)
 - the repair facility name (for reports by Repair Facility)
- the date/time the report was generated

25 1.6.2 *Custom Management Reporting Views*

Custom management reporting views allow the USER to define the fields that they would like to use to build their own report. The fields selected by the USER become the columns of the report, and the system will not limit the number of columns that a USER can request as part of the report. Custom reporting views are discussed at length in use case RP-30 Add/Edit Custom View.

1.6.3 *Report View Management*

The system will present all of the records in a report result set on a single page, and the USER will scroll through the results to find specific records. Report views will not be presented in paging format (e.g., forcing the USER to review the Next 25 of 427 records).

1.7 **Extension Points**

This section describes the extension points of this use case.

1.7.1 *MA-13 Change Authorization*

If the USER selects a line item from the Open Ticket Detail report view, the USER will extend into the MA-13 Change Authorization use case (see the Select Open Ticket from Open Ticket Detail Report **Alternative Flow** on page 4 for additional detail). The USER will have the ability to make any changes or updates that their security level allows, and have the opportunity to return to this use case without making any changes to the open ticket. On completion of activity in the MA-13 Change Authorization use case, the USER will be returned to Step 6 of the **Basic Flow** within this use case.

1.7.2 *RP-03 Add/Edit Custom View*

If the USER selects to add or edit a custom view, the USER will extend into the RP-03 Add/Edit Custom View use case (see the Add/Edit Custom View **Alternative Flow** on page 5 for additional detail). The USER will define or modify their custom report layout and be returned to Step 6 of the **Basic Flow** within this use case.

2. **Screen Design**

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Management Report View Template

This screen provides the USER with a management report view template, and supports Step 6 of the **Basic Flow**.

5 2.1.1 Screen Layout - see Figure 150

2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Office	Combo Box		Branch claims office	<p>This combo list should include all of the offices for the currently active company that the USER is assigned to.</p> <p>If the value of this field is changed, the system should automatically refresh the screen with the current report view for the newly selected office.</p>
Handling for	Output Text		Handling for	For management reports, this value should always be 'Yourself'.
	Output Text		<Report By>	The <report by> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the name of the entity that is being reported on (i.e., Adjuster Name, Office Name, or Repair Facility Name).
	Output Text		<Time/Date Stamp>	The <time/date stamp> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the date and time that the report was generated.

Screen Label	Type	Length	Data Field	Screen Specific Rule
	Output Text		<Report Type>	The <report type> field is a placeholder in the header of the report view. For management reports, this placeholder should be populated with the name of the current report view (e.g., Open Ticket Detail, Custom View 1)
<Column Heading I through X>	Output Text		<Data Columns I through X>	The data columns of the report should correspond to the data columns defined for the selected report view (either static or custom report view). The data columns should be presented in the sequence that they are defined.
Total	Output Text		Number of Customer Files	The total field should include the total number of contracts/customer files that are represented in the report.
Go to	Combo Box		Report sorted by navigation	<p>The 'Go to' combo box should include all of the entities available in the current report. For example, if the report were an Open Ticket Detail view Reported By Adjuster, this list would include all of the Adjusters that would PAGE in the list.</p> <p>The 'Go to' combo box should only be available in detail views.</p>
Report by	Combo box		Report sorted by	The 'Report by' combo box should include all of the currently available report by options in the ARMS Web system. The report by options for the initial release of ARMS Web 2.0 should be: 'Office', 'Adjuster', and 'Repair Facility'

Screen Label	Type	Length	Data Field	Screen Specific Rule
Select a view	Combo box		Report view selection	<p>The 'select a view' combo box should include the names of all report views that are available to the user. This includes all pre-defined (e.g., Open Ticket Detail) and user-defined custom views.</p> <p>There should be an additional option to 'Add a custom view...'. If selected, the system should redirect the user to the Add/Edit Custom View screen in the RP-03 Add/Edit Custom View specification.</p>
Show Only	Combo box		Claim Type Filter	<p>The 'show only' combo box should include the following values:</p> <ul style="list-style-type: none"> • All Claim Types (default) • Insured Claim Types • Plaintiff Claim Types • Uninsured Claim Types • Deceased Claim Types <p>When selected, the report should filter the records to display in the requested report view according to the selection in this combo box. For example, if the selection in the 'show only' field were 'Insured Claim Types', the report view would only include records that have a Claim Type of 'Insured'.</p>

Screen Label	Type	Length	Data Field	Screen Specific Rule
From	Combo box		Closed ticket report from date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'January 2000'.</p> <p>The default value should be 2 months prior to the current month.</p>
To	Combo box		Closed ticket report to date	<p>The 'From' combo box should include all months and years for the last 13 months (rolling 13 month period, current month inclusive). For example a value in this field might include 'July 2000'.</p> <p>The default value should be the current month.</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Choose a different report

The 'Choose a different report' screen function provides the USER with a hyperlink to the View a Different Report section of the Personal Report Template screen. The 'Choose a different report' screen function must be at or near the header of the report.

2.1.3.2 Go to Report Averages

The 'Go to Report Averages' screen function provides the USER with a hyperlink to the bottom of the report to review the averages for each of the numeric columns in the report view. The 'Go to

Report Averages' hyperlink must be at or near the header of the report.

2.1.3.3 Column Heading Sort

5 The 'Column Heading Sort' screen function allows the USER to click on any column heading and have the current report view sorted by the selected column. On initial selection of a column heading, the system will resort the report view by the column selected in ascending order. If the sorted column is selected by
10 the USER, the system will resort the report in descending order.

2.1.3.4 Previous <Report By>

 The 'Previous <Report By>' screen function allows the USER to navigate to the previous detail record in a particular detail report.
15 For example, if the report view were an Open Ticket Detail report by Repair Facility, the 'Previous <Report By>' screen function would allow the USER to move to the previous Repair Facility detail record in a report. This screen function should only be available on open or closed ticket detail views (including custom
20 views), and should only be available if a previous report by item exists (i.e., we wouldn't have a previous item if we were on the first item in the list).

2.1.3.5 Next <Report By>

25 The 'Next <Report By>' screen function allows the USER to navigate to the next detail record in a particular detail report. For example, if the report view were an Open Ticket Detail report by Adjuster, the 'Next <Report By>' screen function would allow the USER to move forward to the next Adjuster's detail report view within the office. This screen function should only be available on
30 open or closed ticket detail views (including custom views), and should only be available if a next report by item exists (i.e., we wouldn't have a next item if we were on the last item in the list).

2.1.3.6 *Download this report*

The 'Download this Report' screen function allows the USER to click on a hyperlink and download a comma-delimited copy of the current report view. The downloaded copy must include:

- ❖ Report Header Information
 - Name of the Report View
 - Name of the Person
 - Date and Time that the Report Was generated
- ❖ Report View Column Headings
- ❖ Report View Records

2.1.3.7 *View Report*

The 'View Report' screen function allows the USER to submit a request for a different type and/or date range of the report view. The system will refresh the screen with updated report view information when this screen function is invoked.

2.1.3.8 *Edit Custom View*

The Edit Custom View screen function is available only in cases that the USER has a custom defined view active. If the USER selects the Edit Custom View hyperlink, the system will present the USER with the Add/Edit Custom View screen and pre-populate the screen with the custom view definition. This will allow the USER to edit the custom views that they have previously defined.

Functional Design Specification

Add/Edit Custom View

Version 1.1

Add/Edit Custom View

1. **Generate Management Report**

1.1 **Brief Description**

5 The Add/Edit Custom View use case describes the process to add or edit a custom report view in the ARMS Web system. Custom views allow the USER to select the data columns that they would like to view in a report (from a pre-defined list of available fields). USERS will have the ability to access their custom views just as they would any other 'standard' report view.

10

1.2 **Use Case Actors**

All actors will use the use case to add or edit a custom report view(s) in the ARMS Web system. All of the following actors can be defined generically as a USER:

15

- **ADJUSTER**
- **COMPANY MANAGER**

For the balance of this use case, all of the above actors will be referred to as USER.

20 1.3 **Pre-Conditions**

- The USER must be signed-on to the system.
- The USER must have the on-line reporting functionality active (i.e., must be on an on-line reporting screen).

25 1.4 **Flow of Events**

The Flow of Events includes all the steps necessary to add or edit a custom report view in the ARMS Web system.

1.4.1 *Activity Diagram* - see Figure 151

30

1.4.2 *Basic Flow*

The **Basic Flow** of the Add/Edit Custom View use case includes all of the required activities for the USER to successfully add or edit a custom report view for use in the on-line reporting functionality of ARMS Web.

- 5 1. The USER selects to add or edit a custom report view from the on-line reporting screen(s).
2. The system displays a screen that allows the USER to define or build a custom report view.
- 10 3. The USER defines the custom report view. The USER will have the ability to indicate a Name for the view, and define the data columns that they would like to have reported. The comprehensive list of data columns that will be available to the USER can be found in Section 1.6 Special Requirements (on page 4).
- 15 4. The USER will submit the custom view to the system.
5. The system will update the ARMS Web database.
6. This ends this use case.

1.4.3 *Alternative Flows*

20 The **Alternative Flows** of this use case can occur when certain conditions exist or when specific USER feedback is provided.

1.4.3.1 *Edit Custom Report View*

25 At Step 1 of the **Basic Flow**, if the USER selected to edit a current custom report view, the system will present the screen to define/build a custom report and pre-fill all fields with the current report definition. For example, if the USER were editing their 'Massive' custom report view, 'Massive' would appear in the report name field and all of the data columns that were previously

30 defined as the massive report would appear in the 'selected columns' portion of the screen.

1.5 **Post-Conditions**

- If successful, a custom report view is created for the USER.
- If unsuccessful, the system state remains unchanged.

1.6 Special Requirements

5 The special requirements for this use case define all of the management report 'views' that are available to the USER. Management reports will be provided two USERS in two ways:

1.6.1 Custom Report Definition

10 This section provides the system framework for custom report view definition in the ARMS Web system. These are additional requirements around functionality to allow USERS to define/build custom report views, and apply to the use case as a whole.

15 *1.6.1.1 USERS will have the ability to create one or more custom views.*

1.6.1.2 USERS will be able to define custom report views for DETAIL views only (USERS will not have the ability to define custom summary views). (Most of the numeric fields that can be summarized for USERS are already provided in the standard management report views.)

20

1.6.1.3 USERS will have the ability to select custom report views by Office, by Adjuster, or by Repair Facility (similar to the standard management reports).

25

1.6.1.4 Custom report views will be limited to the data columns in the Custom Report View Data Domain (see 1.6.2 Custom Report View Data Domain)

30

1.6.1.5 Custom report views must define if the report view retrieves Open, Closed, or All Ticket statuses.

1.6.1.6 All custom report views defined as 'closed ticket only' must allow the user to indicate a date range. The default date range for custom views will be the same as the default range for standard closed ticket reports (the current month plus two (2) prior months).

1.6.1.7 When a custom report view has been defined, the name of the custom report view will become a selection from the USERs view list. For example, 'MyCustomView' would be seen in the list with 'Open Ticket Detail', 'Closed Ticket Detail', etc..

1.6.2 Custom Report View Data Domain

The following is a list of all available data columns that a USER may select as part of a custom report view. The number of columns that a USER selects to make part of the custom report view is not limited, which allows the USER to select a subset or all of these data fields to be published in their report.

Adjuster	Claim Number	Claim Type
Office Name	Renter Name	State of Rental Location
Authorized Days	Authorized Rate	Policy Daily Rate
Days Behind	Number of Extensions	Policy Maximum Rate
Rental Days	Billed Days	Billed to %
Repair Facility Name	Insured Name	Rental Status
Total Charges	Billed Amount	Amount Received
Other Charges	Vehicle Condition (Driveable Flag/ Repairable Flag)	Authorized Total Amount
Surcharges Flag	Rental Start Date	Rental Close Date
Termination Date	Invoice Date	Invoice Approve Date
Remittance Date	Repair Facility Phone Number	

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

5 2.1 Add/Edit Custom View

This screen provides the USER with the ability to add or edit a custom view, and supports Step 2 of the **Basic Flow**.

2.1.1 Screen Layout - see Figure 152

10

2.1.2 Screen Field Definition

Screen Label	Type	Length	Data Field	Screen Specific Rule
Name this report	Text		Custom Report Name	<p>The name a USER provides to refer to the custom report view definition.</p> <p>The name of the report must be unique to other custom reports defined by the user (e.g., a single user can not have two reports with the same name). This uniqueness must only be enforced at the user level (e.g., two different users CAN use the same name for a report).</p> <p>The name of the report will appear in the USERS 'Select a view' combo box when the report view is saved.</p>
Start from a View	Combo box		Custom view start point	<p>The 'Start from a View' combo list allows a USER to select a default or 'standard' view as a starting point in report view definition. The values within the combo box should be 'Open Ticket Detail' and 'Closed Ticket Detail'. If selected, the system should use the values of the Report by 'Adjuster' standard report to pre-populate the 'New Report Fields' list box.</p> <p>The default value of this field should be '-Select a Starting View-'</p>

Screen Label	Type	Length	Data Field	Screen Specific Rule
Ticket Status	Combo box		Custom view ticket status	The 'Ticket Status' combo box indicates the scope of the report in terms of ticket status. The list should include 'Open Tickets', 'Closed Tickets', and 'All Tickets'. The system will use this as part of the overall custom report definition.
Available Fields	List Box		Custom view available fields	<p>The 'Available Fields' list box includes all of the fields that are available to be included in a custom view, but have not yet been selected to be included in the report.</p> <p>When an available field is selected from the list to be included in the report, the field should be removed from this list box (and populate the 'New Report Fields' list box).</p> <p>For a list of all available fields see Section 1.6.2 Custom Report View Data Domain above.</p>

Screen Label	Type	Length	Data Field	Screen Specific Rule
New Report Fields	List Box		Custom view selected fields	<p>The 'New Report Fields' list box includes all of the fields that have been selected by the USER. These fields define the columns of the report.</p> <p>The sequence that the fields appear in the report is defined from top to bottom of this list box (e.g., the first field in the list = the first column in the report). This sequence can be modified using the Sequence Up and Sequence Down screen functions (see 0 Screen Function Definition below).</p> <p>If the USER selects a starting view (from the Start from a View field), the list box will populate with all of the fields that make up the standard view selected (e.g., if the USER selects 'Closed Ticket Detail' from the Start from a View field, all of the fields that make up a Closed Ticket Detail report would populate in this field.</p>

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 Remove

The 'Remove' screen function allows a USER to remove selected fields from the 'New Report Fields' list box (and re-add them to the 'Available Fields' list box).

2.1.3.2 Insert

The 'Insert' screen function allows a USER to add selected fields to the 'New Report Fields' list box (and remove them from the 'Available Fields' list box).

5

2.1.3.3 Dictionary

The 'Dictionary' screen function allows a USER to open a dictionary that defines all of the fields that can be added to a report view. The dictionary will be included as part of the help functionality of the system.

10

2.1.3.4 Sequence Up

The 'Sequence Up' screen function (presented with an 'up' arrow in the screen shot) allows a USER to move a **selected** field in the 'New Report Fields' list box up in the sequence of the report.

15

2.1.3.5 Sequence Down

The 'Sequence Down' screen function (presented with a 'down' arrow in the screen shot) allows a USER to move a **selected** field in the 'New Report Fields' list box down in the sequence of the report.

20

2.1.3.6 Save Report View

The 'Save Report View' screen function allows the USER to save the custom report definition and return to the reporting use case(s). The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02) and be presented with the newly defined report view.

25

2.1.3.7 Close without Saving

The 'Close without Saving' screen function allows the USER to exist the screen with saving any changes made. The system will return the USER to the report use case from which they entered this use case (either RP-01 or RP-02).

30

- **OFFICE ADMINISTRATOR** – The OFFICE ADMINISTRATOR is a person who can perform this use case for the company. The OFFICE ADMINISTRATOR may maintain any user in their company structure to which they have been assigned ownership.

5

1.3 Pre-Conditions

- The USER must be logged into the system.
- If maintaining a user, the USER should have the ability to maintain that user. In order to maintain a user at a specific office, the ADMINISTRATOR must have access to that specific office.
- If adding a user, the USER should have the ability to add a user.

10

1.4 Flow of Events

The Flow of Events will include all the steps necessary to add or maintain a company user in the ARMS Web system.

15

1.4.1 Activity Diagram - see Figure 153

1.4.2 Basic Flow

The Basic Flow will describe how a USER will maintain a user in the ARMS Web system.

20

1. The USER will choose to maintain user(s).
2. The system will present a list of all users that are in all the offices the USER has access to maintain.
3. The USER will choose a user to maintain.
4. The system will display the user's information for the USER to edit.
5. The USER will update the user's information and submit the information to the system.
6. The system will validate the information entered.
7. The system will update the ARMS Web database.
8. This ends the use case.

25

30

1.4.3 *Alternative Flows*

1.4.3.1 *Add User*

5 At step three in the Basic Flow, the USER may choose to add a user, if they have the authority level to do so. The USER will enter a primary office, UserID, First Name and Last Name for the new user. The system will then validate that the office was entered and the UserID does not exist. If a UserID match is found, or the office was not entered, the

10 system will display an error and request the USER enter a new UserID. Otherwise, the system will display the default settings for a new user; the USER will update the default settings and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

15

1.4.3.2 *Show All Users for the Company*

At step three in the Basic Flow, the USER may choose to display all users within the company. This would allow for adding users to offices the USER controls. The USER will choose the user they wish to work with

20 and the system will then display the user's information; the USER will add the user to any offices the USER controls and submit the information to the system. The system will validate the information entered, and update the ARMS Web database. The use case is then complete.

25

1.4.3.2.1 If a user's primary office is not an office controlled by the USER, the USER may only add the user to offices the USER controls. The USER should not be able to change any of the user's settings. A USER that has control of a user's primary office can only change user settings.

30

1.4.3.3 *User Information Validation Fails*

In step six of the Basic Flow, the system may find that user information entered by the USER does not meet the validation criteria. The system

should return the USER to step four of the Basic Flow, show the USER the invalid data, and prompt the USER to reenter the data.

5 This rule also applies for new user creation. Whenever a new user is submitted to the system for creation, the system must validate that the criteria entered is valid. If any information is invalid, the system should present the invalid data to the USER, and prompt the user to correct it.

10 1.4.3.3.1 The following fields must be populated to complete a user update or new user creation.

- Last Name
- First Name
- UserID (Must be validated to ensure it is not a duplicate ID)
- 15 • Home Office (Must be a valid office and not null)

1.4.3.4 Cancel Add / Maintain User

20 Until step five in the Basic Flow, the USER may choose to cancel the use case. The system should not store any changes made by the USER within the use case.

1.5 Post-Conditions

- 25 • If the use case was successful and the USER was maintaining a user, the user criteria being changed will have been changed and updated in the ARMS Web system.
- If the use case was successful and the USER was adding a user, the user will have been added in the ARMS Web system.
- If the use case was unsuccessful, the system state will be unchanged.

1.6 Special Requirements

1.6.1 User Inactivation

In order to inactivate a user, the following set of criteria must be validated.

If any of the criteria are found to be true, then the system will not allow the USER to inactivate the user.

5

10

15

20

25

- If A4XREFL1/X4STCD is equal to 'C' (closed rental) and any tickets were closed in the past seven days
- If A4XREFL1/X4STCD is equal to 'A' (audited invoice)
- If A4XREFL1/X4STCD is equal to 'R' (reservation)
- If A4XREFL1/X4STCD is equal to 'O' (open contract)
- If A4XREFL1/X4STCD is equal to 'U' (unconfirmed) and A4XREFL1/X4RSFG is equal to 'D' (Direct Bill request)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'C' (extension request & message sent)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'M' (authorization message sent)
- If A4XREFL1/X4STCD is equal to 'Z' (sent) and A4XREFL1/X4RSFG is equal to 'X' (extension request sent)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'B' (invoice sent from ARMS)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'R' (invoice returned to adjuster)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'E' (rejected system error)
- If A4XREFL1/X4STCD is equal to 'B' (authorized invoice) and A4XREFL1/X4RSFG is equal to 'Q' (rejected invoice ARMS researching)

1.6.2 User Default Settings

30

Whenever a new user is created, the settings for that user should be defaulted based on the user's primary office profile settings. For example, if the office is a reservation only office, the user should default

to reservation only. This does not imply that the administrator cannot change the settings. This should also apply to whether can receive work setting should be on or off for the user/team. If all other users/teams in the office have the setting either on or off, then the new user should mimic this setting. Once again, this does not imply that the administrator cannot change this setting.

1.7 Extension Points

None.

2. Screen Design

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

2.1 Create or Modify User

This screen will allow the USER to search for and select a user to modify or select to add a new user.

2.1.1 Screen Layout - see Figure 154

2.1.2 Create or Modify User

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User Indicator		
User ID:	Input	10	User Id	ARMS Profile ID	
First Name:	Input	15	First Name of New User	First Name	
Handling For	Output	30	Handling For	First Name + Last Name	
Last Name:	Text Box	20	Last Name of New User	Last Name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
User ID	Output	10	List of User Ids within the company	Adjustor Code	
Name	Output	30	List of Users within a Company	First Name + Last Name	
User ID:	Input	10	User Id	Adjustor Code	
Primary office	List Box	25	Primary office	external organization name	
Primary office	Output	10	List of Primary offices	external organization abbreviated name	
Office Description	Output	20	List of Office Descriptions within Company	external organization name	
Office:	Output	4	Office Id	external organization abbreviated name	

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.1.3.1 A - Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.3.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.1.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create

a new user (Office, Last Name, First Name UserID). If the information is entered, the system will create a new user with those attributes and the other user attributes defaulted. The system should then display the new user's profile.

5

2.2 Create or Modify Team

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

10

2.2.1 Screen Layout - see Figure 155

2.2.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
New Team	Radio Button	1	Create a New Team		
New User	Radio Button	1	Create a New User Indicator		
Name	Output	20	Adjusters Associated with the Company	First Name + Last Name	
Handling For	Output	20	Handling For	First Name + Last Name	
User ID	Output	7	List of User Ids Associated with a Company	Adjustor Code	
Primary office	List Box	20	Primary office associated with Team	external organization abbreviated name	
Primary office	Output	10	List of Primary offices Associated with a Company	external organization abbreviated name	
Office Description	Output	20	List of Office Descriptions associated with a comp	external organization name	
Office:	Output	10	Office	external organization abbreviated name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Team Name	Input	15	Team Name	external organization name	

2.2.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.2.3.1 A - Z Anchor Links

When any of the letters are clicked, the list of users should position itself with that letter presented at the top of the user view area on the page.

2.2.3.2 Teams Link

When the team link is clicked, the list of teams should position itself at the top of the view area on the page. The list of teams should be placed last in the list of all users/teams.

2.2.3.3 Process

When the Process button is clicked, the system should check to see that the appropriate information was entered in order to create a new team (Office, Team Name). If the information is entered, the system will create a new team with those attributes and the other user attributes defaulted. The system should then display the new team's profile.

2.3 User Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

2.3.1 Screen Layout - see Figure 156

2.3.2 User Profile

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Reset Password	Check Box	1	Reset Password Indicator		
Email Address:	Text Box	15	Adjuster's Email Address	e-Mail address	
First Name	Text Box	15	First Name	First Name	
Handling For	Output	10	Handling For	First Name + Last Name	
Last Name	Text Box	10	Last Name	Last Name	
User ID:	Output	0	User Id	Adjustor Code	
Active	Check Box	1	User is Active	Status:Active/Inactive	
Address	Output	25	Home Office Address	Customer Address Line 1 + Customer Address Line 2	
Phone:	Output	10	Home Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Home Office Postal Code	Zip Code	
City	Output	15	Home Office City	customer city text	
ST/PROV	Output	5	Home Office State	customer state code	
Office	Output	10	Office	external organization abbreviated name	
Home Office	List Box	20	Office Name	external organization name	
Other authorized Offices	List Box	20	Other authorized Offices for The User	external organization name	
Allow files and action items to be assigned to this user	Check Box	1	Allow files & action items to be assigned to user	profile type value code	If Allow Files and Action Items have been selected, this user or team will appear in the Handle For list.
Authorize/Extend Rental	Check Box	1	Allow user to Authorize/Extend Rental	profile type value code	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
User Maintenance	Check Box	1	Allow user to conduct user maintenance	profile type value code	
Create Reservation	Check Box	1	Allow user to create reservation	profile type value code	
Reporting (Management)	Check Box	1	Allow user to do reporting	profile type value code	
Pay Invoice	Check Box	1	Allow user to Pay Invoices	profile type value code	
Days/Rental	Text Box	10	Authorization Limit on Days per Rental	profile type value quantity	
\$ ____ max/rental	Text Box	10	Authorization Limit on Maximum Dollars per Rental	profile type value amount	

2.3.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.3.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.3.3.1.1 The user must have a First Name, Last Name and Home Office entered. The Home Office must be a valid office for that company.

2.3.3.1.2 Work Authority for each user will default to all enabled.

2.3.3.1.3 If the Active switch has been set to inactive, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the user to be set to inactive. The

system will notify the USER that the user has open work assigned to them and request that they transfer the work before attempting to inactivate the user.

5 2.3.3.1.4 If the reset password option is set, the system will reset the user's password. This will reset the user's password to the password used for new users. **Need to verify what that password is.**

10 2.3.3.1.5 If the File Ownership flag is turned off, the system will check to see if the user owns any open work. If the user owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the user has open work assigned to them and request that they transfer the work before
15 attempting to turn off file ownership.

2.4 Team Profile

This screen will allow the USER to input and change information about a user (i.e. name, E-mail address, etc.)

20

2.4.1 Screen Layout - see Figure 157

2.4.2 Create or Modify Team

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Allow files and action items to be assigned to this team	Check Box	1	Allow action items to be assigned to team		
Available	List Box	30	Available Members for Team	First Name + Last Name	
E-mail Address	Text Box	20	Email Address	e-Mail address	
Handling For:	Output	20	Handling For:	First Name + Last Name	

Screen Label	Type	Size	Screen Field Name	Data Field Name	Screen Specific Rule
Active	Check Box	1	Team Active Indicator	Status:Active/Inactive	
Team Members	List Box	30	Team Members	First Name + Last Name	
Phone Number	Output	10	Branch Office Phone Number	Customer Phone Number + Customer Phone Extension	
Postal	Output	10	Branch Office Postal Code	Zip Code	
Address	Output	25	Home Office Address	Customer Address Line 1 + Customer Address Line 2	
ST/PROV	Output	3	Branch Office State or Province	customer state code	
City	Output	15	Home Office City	customer city text	
Home Office	Output	20	Home Office Name	external organization name	
Office	Output	5	Office	external organization abbreviated name	
Team Name	Text Box	20	Team Name	external organization name	

2.4.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

2.4.3.1 Process

When clicked, the system will ensure that all rules on the page are enforced. Upon completion, the system will return the USER to the Create a New User / Team page.

2.4.3.1.1 The team must have a Team Name and Home Office entered. The Home Office must be a valid office for that company.

5 2.4.3.1.2 If the Active switch has been set to inactive, the system will check to see if the team owns any open work. If the team owns work, the system will not allow the team to be set to inactive. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to inactivate the team.

10 2.4.3.1.3 If the File Ownership flag is turned off, the system will check to see if the team owns any open work. If the team owns work, the system will not allow the file ownership flag to be turned off. The system will notify the USER that the team has open work assigned to them and request that they transfer the work before attempting to turn off file ownership. If the user or team does not
15 receive File Ownership, that user or team will not display in the Handle For list.

3. **Application Operations**

20 This section will detail all the application operations that are part of this Functional Specification Document.

3.1 **Build list of Users**

(Office Id, First Name, Last Name, User ID)

25 Build a list of User first and last names NOT limited to a given office in order to search for a user. Limited by the first or last name passed.

3.2 **Find User Information**

(User Id)

30 Retrieve the current values for a user's profile.

3.3 **Update User Information**

(User Id, Name, e-mail Address, Out of Office, Handler for out of office user, Initial Page, Is user Multi-company, Is User Active, Current Password, New Password, Receive Authorization Assignment)

Update the given data values for the user profile.

5

3.4 Build list of User offices (User Id)

Build a list of office names for the offices the user is assigned to.

10 3.5 Find User Office Information (User Id, Office Id)

Retrieve the current values assigned for the user at a given office.

15 3.6 Update User Office Information (User Id, Office Id, and data values)

Update the given data values for the user profile.

3.7 Add User Office Information (User Id, Office Id)

20 Assign user access to another office. Default values are set for the users access.

3.8 Remove User Office Information (User Id, Office Id)

25 Revoke assignment of the user to an office. The user cannot be revoked from their primary office.

3.9 Build a list of users to which the administrator has access (Company ID, Administrator ID, User ID)

30 Build a list of User first and last names limited to a given office in order to maintain a user. Limited by the first or last name passed.

3.10 Validate that User ID does not exist

(User ID)

Verify that the administrator must add a new user.

4. Data Fields

5

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

10

4.1.1 User Language Preference

This is the user's language preference while working with the ARMS Web System.

Data Field Type: Alpha-Numeric

Data Field Length: 10

Data Source: <Data Source>

4.1.2 Phone Number

15

This is the user's phone number.

Data Field Type: Alpha-Numeric

Data Field Length: 10

Data Source: <Data Source>

4.1.3 Profile Attribute Id

I.S. assigned identifier for a profile attribute. Must be unique and non-blank. Each profilable item will have a profile attribute.

Data Field Type: Alpha-Numeric

Data Field Length: 20

Data Source: <Data Source>

20

4.1.4 Last Name

This is the last name of the user.

Data Field Type: Alpha-Numeric

Data Field Length: 20
Data Source: <Data Source>

4.1.5 *Handler for out of office user*

This is the user who will handle work for the user who is out of office.

Data Field Type: Alpha-Numeric
Data Field Length: 0
Data Source: <Data Source>

5 4.1.6 *Start Page*

This is the initial page that the user will see when he logs on to the system.

Data Field Type: URL
Data Field Length: 256
Data Source: <Data Source>

10 4.1.7 *Is user out of office ?*

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type: Boolean
Data Field Length: 1
Data Source: <Data Source>

15 4.1.8 *Is the user multicompany ?*

This flag indicates that this user can do work for multiple insurance companies. These are typically Enterprise Rent-A-Car employees working on site at an insurance company office or Rental Management Services employees who are also Enterprise employees who manage rentals for the insurance company but are not on site.

Data Field Type: Boolean
Data Field Length: 1

Data Source: <Data Source>

4.1.9 *Can user receive work ?*

This flag indicates that user can receive work (e.g. requests for authorization, requests for extension etc.). Typically, a manager would set this flag to “No” so that work would not be assigned to him or her although he or she could be notified in certain situations like authority limit exceeded etc..

Data Field Type: Boolean

Data Field Length: 1

Data Source: <Data Source>

4.1.10 *Is User Active ?*

This flag indicates the user is currently active and may log on to the system to do work.

Data Field Type: Boolean

Data Field Length: 1

Data Source: <Data Source>

4.1.11 *Email Address*

This is the email address of the user.

Data Field Type: Alpha-Numeric

Data Field Length: 30

Data Source: <Data Source>

4.1.12 *First Name*

This is the first name of the user.

Data Field Type: Alpha-Numeric

Data Field Length: 15

Data Source: <Data Source>

4.1.13 *Password*

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type: Password

Data Field Length: 10

Data Source: <Data Source>

4.1.14 User Id

5 This is the user id that the user will use to sign on to the ARMS Web System. This id must be unique across the whole system.

Data Field Type: Alpha-Numeric

Data Field Length: 10

Data Source: <Data Source>

5. Questions and Answers

10 Issue Number: 321

Question: When do we “Kill” profiles that have been created but not used?

Question 2 - Do we allow for deleting users, and if so, who would handle this function? Question 3 - Do we allow for deleting inactive user, and if so, who would handle this function?

15

Status: Closed - Resolved

Resolution: 3-21-00, Dave Smith - The other questions would seem to have

20

procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out?

08-07-00 - Brad Reel: UserIDs that were created, but never accessed will be made inactive after six months. UserIDs that have not been accessed for two

years will also be made inactive. After being made inactive, they will be purged after three additional months.

25

Issue Number: 322

Question: Do we allow for deleting users, and if so who would it be that does so?

5 **Status:** Closed - Merged

10 **Resolution:** 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with Issue 321

Issue Number: 323

15 **Question:** When do we delete an inactive user? And who would handle?

Status: Closed - Merged

20 **Resolution:** 3-21-00, Dave Smith - The other questions would seem to have procedures in place today. Unless there is a compelling reason, I don't think we should reinvent the wheel. Could you check with the ARMS team to find out? 3-27-00, merged with issue 321

Issue Number: 324

25 **Question:** User ID: Do we have current Enterprise Business rules that we need to enforce, and if so, what are they? The assumption we made when discussing this was that the admin could give them whatever ID the user desired. If user wanted the ID Beavis, the admin could create it. The question is, are there some rules we want to enforce (i.e. User ID's start w/ first three characters of insurance company's name, GEI for GEICO) and some defaults for both UserID &
30 Password? Maybe for GEICO, the first user is GEI0001 and the default password is GEICO. Just something we need to address.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - I think we should give them whatever user ID they want.

5 3-30-00. Kim DeVallance - user ID is a company specific item. For example, GEICO's is their associate ID (similar to our employee number). Progressive uses their PACMAN ID, Nationwide uses their RACF ID...all a similar concept. It is an ID that the adjuster is familiar with and I think we should allow the customer to use an employee number already familiar to the adjuster.

10 4-7-00, Issue Mtg, the field is 10 characters, First three will be company driven, the next 7 can be alpha/num and the users choice.

4-11-00, Brad Reel - Current State, ID's are first three characters of the company's name, and up to seven numeric characters. Could possibly expand to seven alpha-numeric instead of just numeric. Barring any disagreement, we will suggest the following in the ARMS Web system: first three characters of the company's name are the first three characters of the ID. Then the ID must include at least 4 alpha-numeric characters with at least one number in it. The minimum ID length would be 7 characters, the maximum 10. Suggest we try to force companies to use their employee IDs as the seven digits. ARMS Web system can generate a number if necessary.

Need to confirm with our security people that this is acceptable security on an Enterprise-owned application. Also, should consider whether or not we think first three chracters of a company's name will allow us to always uniquely identify companies.

Issue Number: 325

30 **Question:** Current State we capture the primary address for the user, (the address the user (adjuster) is located at) do we want to do the same in future state? In the screen prototype should the primary user (adjuster) address be capture in the user profile screens, given that we currently have an office address in the office profile?

Status: Closed - Resolved

Resolution: 3-30-00, Kim DeVallance - Kim-I do not think it is necessary for the ARMS/Web application, but it may be a mandatory field for the ARMS system when it processes info. I would recommend checking with the analysts from ARMS. We pull the address from ECARS when we send a paper bill, and if the bill is electronic, the address does not matter.

4-7-00, Issue Mtg, Default to office address, allow at the user level to be changed, if it is changed it will only update the database not the 400.

4-11-00, Brad Reel - When creating a user, we need to capture a user-specific address. It should default to the primary office they are assigned to when they are first created, but be changeable. This means we have to change the process for adding a user so we identify their primary office before we enter address information.

Issue Number: 326

Question: Can a user be maintained at more than one office? Do we still have a default/primary office when the user is created?

Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - For tracking purposes, I think we need to maintain one profile only. If someone moves to another location because of a disaster, we should move the profile to that office. Perhaps to make it easy on the transition, we could transfer their base profile and let the new office modify accordingly.

3-27-00, Ask Brad to follow-up with Dave Smith.

3-30-00, Kim DeVallance - Current state, yes a user can be maintained at more than one office, but a user should have a primary office.

Issue Number: 327

5

Question: Do we need a primary office at which you see all work below you? This would apply only to people who were in offices that were not claims offices. Example: I am a regional VP (wouldn't that be cool) and I want to use the system. I define "Default One" as my region, so when I look at stuff in the system an I see all the offices under my office as my default.

10

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement.

15

3-30-00, Kim DeVallance - This would be great!!!

Issue Number: 328

Question: Do we need a primary office that you can create work at? This would apply to everyone and defines the primary office I can create work in. For an Adjuster, this would be their primary office. For someone at a higher level, it would be the office they assign work to if they create it. Following the example above, if that VP creates a res (unlikely, but work with me), this default would be the claims office it would be sent to for completion.

20

25

Status: Closed - Resolved

Resolution: 3-22-00, Dave Smith - Yes, I think this a good enhancement as well.

30

3-30-00, Kim DeVallance - Yes, but keep in mind during the life of a rental we can transfer the rental to different offices within the same company profile.

Issue Number: 329

Question: Where does the manager get assigned to a user? At the Office Level, the User Level or the Team level? Can a user have more than one manager?

5 **Status:** Closed - Resolved

10 **Resolution:** 08-08-00 - Brad Reel: Upon further discussion with the business, the process for selecting a person to handle an authorization limit is as follows: When a user hits an authorization limit, the system will request that the user select another user to approve the request and handle the rental. The system will only present users that have limits higher than the requested amount/number of days. Once the user has been selected, the rental will then be permanently transferred to the chosen user.

15 **Issue Number:** 331

20 **Question:** Under Report Layout section, is this for the office to give the user what fields that they want them to see? Then the user can set how he views these fields in MY PROFILE?

20 **Status:** Closed - Resolved

25 **Resolution:** 3-21-00, Anita Klopfenstein - It allows the user to create a default report layout as well as establish groupings. For example: I may want a team group which allows me to select adjusters to view. However, this would be a function which had to be approved in the profile of the user. Otherwise they can only see their work.

30 **Issue Number:** 332

Question: Are the authorization limits for the life of the rental or the transaction, (as applied to use by an adjuster)

Status: Closed - Resolved

Resolution: 3-21-00, Anita Klopfenstein - Both - There is a daily limit and a rental max. For the life of the rental.

5

Issue Number: 350

Question: Do we want to force a search before and admin can add a user?

10

Status: Closed - Resolved

Resolution: 08-07-00 - Brad Reel: When adding a user, the system will search for the UserID and ensure it does not exist. No other searches will be performed.

15

Issue Number: 352

Question: Where does the ability to change the language the user can view the screens in reside? With the Admin or the user?

20

Status: Deferred

Resolution:

Issue Number: 356

25

Question: When setting up a user, should the office profile restrict the user's profile? Or are the office and user profiles independant of each other?

Status: Closed - Resolved

30

Resolution: 08-07-00 - Brad Reel: Office profile overrides user profile. A user can have more rights than the office, but will still be restricted to only activities

that can be performed in that office based on the office profile while they are working in that office.

Issue Number: 360

5

Question: Brad Decoder, Password/ do we send e-mail to the admin to let them know how many times login failed?

Status: I2 User Review

10

Resolution:

Issue Number: 365

15

Question: Do we need a batch process for adding users?

Status: Closed - Resolved

20

Resolution: 07-03-00 - Brad Reel: This question has also been asked in the more general setting of "Should a process exist for walking a user through setting up an entire company (much like a wizard tool)." For this release of ARMS Web (V2.0) a batch process for creating users will not be created. There will also not be a wizard for creating a company. However, for future releases, this wizard will be a very worthwhile tool to create and should be incorporated into future releases.

25

Functional Design Specification

User Profile

30

Version 1.0

1. User Profile Use Case

1.1 Brief Description

The User Profile use case describes how the USER would customize their working environment. User Profile will allow the USER to change their password, set his or her out of office, and modify their Favorite Locations list.

5

1.2 Use Case Actors

Actors will use this use case to update their user profile. The following actors will interact with this use case:

- ENTERPRISE ADMINISTRATOR
- COMPANY ADMINISTRATOR
- OFFICE ADMINISTRATOR
- CLAIMS MANAGER
- ADJUSTER
- FIRST NOTICE OF LOSS ADJUSTER
- PROCESSOR

10

15

1.3 Pre-Conditions

- The company must be enrolled in ARMS Web.
- The USER must be enrolled and have an active User ID and password.
- The USER must be logged into the ARMS Web system.

20

1.4 Flow of Events

The Flow of Events will include the necessary steps to make changes and updates to "My Profile".

25

1.4.1 Activity Diagram – see Figure 158

1.4.2 Basic Flow

1. The USER will choose to edit their User Profile
2. The system will display the USER'S User Profile.

30

3. The USER will specify the action they would like to perform (user settings, set out of office, add a Favorite Location, remove a Favorite Location, edit a Favorite Location).
4. The USER will select one of the options.
5. Based on the USER'S response, one or more of the following subflows is executed:
 - If the USER chooses to edit a Favorite Location, the Edit Favorite Location Subflow is executed.
 - If the USER chooses to add a Favorite Location, the Add Favorite Location Subflow is executed.
 - If the USER chooses to remove a Favorite Location, the Remove Favorite Location Subflow is executed.
 - If the USER chooses to set the Out of Office Function, the Out of Office Subflow is executed.
 - If the USER chooses to Change Password, the Change Password Subflow is executed.
 - If the USER chooses Confirmation Page, the Confirmation Page Subflow is executed.

1.4.2.1 Edit Favorite Location Subflow

This subflow allows the USER to edit a location on their Favorite Locations List.

1. The USER selects the location they wish to edit from their Favorite Locations List.
2. The USER changes the name they wish to use to identify the location. This is the name that will be displayed to them in their Favorite Locations List.
3. The USER submits the information to the system.
4. The system updates ARMSWeb to reflect the new Favorite Location.
5. The use case ends.

1.4.2.2 Add Favorite Location Subflow

This subflow allows the USER to add a location to the Favorite Locations List.

- 5 1. The USER will execute Functional Specification MA-02:
Find a Rental Location to search for the location they
would like to add to their Favorite Locations List.
2. The USER selects the location they wish to add to their
Favorite Locations List.
- 10 3. The USER enters the name they wish to use to identify the
location. This is the name that will be displayed to them in
their Favorite Locations List.
4. The USER submits the information to the system.
5. The system updates ARMSWeb to reflect the new Favorite
Location.
- 15 6. The use case ends.

1.4.2.3 Remove Favorite Location Subflow

This subflow allows the USER to remove a location to the Favorite Locations List.

- 20 1. The USER selects the location they wish to remove from
their Favorite Locations List.
2. The USER submits the information to the system.
3. The system updates ARMSWeb to reflect the removal of
the Favorite Location.
- 25 4. The use case ends.

1.4.2.4 Out of Office Subflow

This subflow allows the USER to select when they are out of office and assigns their workload to another USER.

- 30 1. The USER will set choose to be Out of Office.
2. The USER will enter the beginning date of when they will
be Out of Office.

3. The USER will choose an alternate USER to handle their work for each office the USER is assigned to.
4. The USER submits the information to the system.
5. The system validates the changes.
- 5 6. The system updates ARMSWeb database to reflect the out of office status. At this time, the system will assign any work that exists for the USER to the chosen user(s). Any new work that is assigned to the USER will automatically be reassigned by the system to the chosen user(s).
- 10 7. The use case ends.

1.4.2.5 Change Password Subflow

This subflow allows the USER to change their current password.

1. The USER enters the old password.
- 15 2. The USER enters the new password of their choice.
3. The USER re-enters new password for verification
4. The USER submits the passwords to the system.
5. The system validates the password changes.
- 20 6. The system updates ARMSWeb to reflect the new password changes.
7. The use case ends.

1.4.2.6 Confirmation Page

25 This subflow allows the USER to turn on or off confirmation pages in the ARMS Web system.

1. If Confirmation pages have been turned off, the user will turn them on.
2. If Confirmation pages have been turned on, the user will turn them off.
- 30 3. The USER submits the change to the system.
4. The system updates ARMSWeb to reflect the change.
5. The use case ends.

1.4.3 *Alternative Flows*

1.4.3.1 *Invalid Password*

5 At step five in the Change Password Subflow, if the current password is incorrect or if the confirmed password does not match the new password, the system will prompt the USER to re-enter the old, the new and the confirmation password.

10 1.4.3.1.1 It will be considered invalid if the new password entered was one of the USER'S last five ARMS Web passwords.

1.4.3.1.2 It will be considered invalid if the new password is not at between six and 10 characters and alphanumeric in type. -

15 **Validate 1.4.3.1.1 & 1.4.3.1.2 in Sign-on.**

1.4.3.2 *Alternate Users not Chosen in Each Office USER is Assigned*

20 At step five in the Out of Office Subflow, the system will validate that a user was selected to handle the USER'S work in each office the USER is assigned to. If a user was not chosen for each office, the system will notify the USER that they must select a user to handle their work in each office they are assigned to. The system will then return the USER to step two of the Out of Office Subflow.

1.4.3.3 *Out of Office Start Date is in the Past*

25 At step five in the Out of Office Subflow, the system will validate that a user selected an out of office date that is present (today) or in the future. If the date is in the past, the system will generate an error and ask the USER to enter a date that is either today or in the future. The system will then return the USER to step two of

30 the Out of Office Subflow.

1.4.3.4 *Favorite Location Name Entered is the same as an Existing Location*

5 When the USER submits the name for a new location, or changes the name of an existing location, the system will validate that the name entered is not an exact duplicate of any other name in the USER'S list of Favorite Locations. If the name is a duplicate, the system will prompt the USER to enter a different name for the location in question. The system will then return the USER to step one of the Edit Favorite Location Subflow.

1.4.3.5 *Cancel User Profile*

10 At any point during the use case up until a change has been submitted to the system, the USER may decide to not update their profile.

1.5 **Post-Conditions**

- 15
- If the use case was successful then either a new password has been assigned, the out of office function will be turned on, or the USER'S Favorite Locations will be edited.
 - If the use case was unsuccessful then the system will remain unchanged.

20 1.6 **Special Requirements**

None.

1.7 **Extension Points**

None.

25

2. **Screen Design**

A definition of the screen layout(s), screen data fields, and screen functions that are used to implement the flows identified above. More than one screen may be used to implement support for the use case flow.

30

2.1 **My Profile**

This screen will allow the USER to pick which functions that they wish to change.

2.1.1 Screen Layout - My Profile - see Figure 159

2.1.2 My Profile

Screen Label	Type	Size	Screen Field Name	Data Field	Screen Specific Rule
Remove This Branch	Check Box	1	Delete branch from preferred locations indicator		
First Day Out:	List Box	10	Out of office start date		Three drop downs: month, day, year
Off	Radio Button	1	Select feature setting		
On	Radio Button	1	Select feature setting		
Off	Radio Button	1	Show confirmation page		
On	Radio Button	1	Show confirmation page?		
Confirm Password:	Text Box	0	Password	change password	N/A.
New Password:	Text Box	0	Password	change password	N/A.
Adjuster:	List Box	30	Handler for out of office user	First Name + Last Name	
Handling For	Output	15	Handling For Adjuster	First Name + Last Name	
Old Password:	Text Box	0	Password	User Paswd	N/A.
Address	Output	30	Preferred Location Address	Address Line + Address Line2	
Office	Output	10	Claims Office	external organization abbreviated name	
Office:	Output	10	Handler for out of office adjuster's office	external organization abbreviated name	
Name	Input	30	Preferred Location Name	location name	Defaults to address name

2.1.3 Screen Function Definition

This section includes the definitions for all functions that can be performed within the screen. This includes operations invoked by button clicks, specific shortcut keystrokes, or other actor activity.

5 2.1.3.1 *Process*

When clicked, the system will validate the information on the screen is correct and complete. If an error is found the screen will be redisplayed with a message indicating the error condition and highlighting the field in error. If no errors are found, the database will be updated with the new information.

10 2.1.3.2 *Add A Different Office*

When clicked, the system will take the USER to MA-02-Find Rental Location Use Case. Here, the USER will select a new location to add to the preferred location list, and then return to the PR-07-User Profile Use Case. The new information will be validated and the database will be updated.

20 3. **Application Operations**

This section will detail all the application operations that are part of this Functional Specification Document.

25 3.1 **Retrieve User Profile (User Id)**

Retrieve user's current profile settings.

3.2 **Update User Profile (User Id, Out of Office, Assigned Adjuster, Start Page)**

Update user's Out of Office status, Adjuster to handle work during out of office period, and the user's initial page.

3.3 **Change Password (Current Password, New Password, New Password Confirmation)**

Change the user's password from the current password to the new password.
Validate that the current password is correct.

4. Data Fields

5

4.1 Data Field Definition

This section includes a definition of all data fields included in the functional specification.

10

4.1.1 *Handler for out of office user*

This is the user who will handle work for the user who is out of office.

Data Field Type: Alpha-Numeric

Data Field Length: 0

Data Source: <Data Source>

4.1.2 *Start Page*

15

This is the initial page that the user will see when he logs on to the system.

Data Field Type: URL

Data Field Length: 256

Data Source: <Data Source>

4.1.3 *Is user out of office ?*

20

This flag indicates that the user is out of office and no work should be assigned to them. Instead another user can be set up to handle for the user who is out of office.

Data Field Type: Boolean

Data Field Length: 1

Data Source: <Data Source>

4.1.4 *Password*

This is the user specified password that the user will use along with the user id to log on to the ARMS Web System.

Data Field Type: Password
Data Field Length: 10
Data Source: <Data Source>

5. Questions and Answers

Issue Number: 334

5

Question: Is out of office assigned at the user level or at the office level?
(Could you set this for each office you work out of?) Example: You have been created at the St. Louis Office and you need to travel to California to help with a disaster, does California have the rights to maintain you.

10

Status: Closed - Resolved

Resolution: 4-7-00, Issue Mtd., Defer to user review I2

15

08-07-00 - Brad Reel: A user will be required to set their out of office function for all offices they are assigned to in order to activate the function. The function is set up using the assumption that a user would only be out of office if they were unreachable at all offices (vacation, training, etc.). Since the system can be accessed from any web connection, it is possible for a user to do work for any and all offices they are assigned to from anywhere. Therefore, it seems logical that a user would only set their out of office function if they were not available in any capacity.

20

Issue Number: 335

25

Question: Does a user have the field level control of the fields he can see?

Status: Closed - Resolved

Resolution: 4-7-00, Issue Mtg., Should be set at the Office level, the user should not be able to set the field that they want to see.

30

4-11-00, Brad Reel - User does not need to have control over the fields they see. Control at the office (or team level, where applicable) is sufficient.

Issue Number: 336

5

Question: Are we still using the "Requests to be Processed" page (the Command Center) as an option for a start up page?

Status: Future

10

Resolution: 4-7-00, Issue Mtg., Defer to future release, We are not sure that it will not be an option, right now it is not.

4-11-00, Brad Reel - As of right now, the "Command Center" page (Requests to be Processed) should not be an option for the start page, and is not even planned for the ARMS Web system.

15

Issue Number: 434

20

Question: 07-06-00 - Brad Reel: The ARMS Web redesign has a requirement that the system would allow the user to choose the page in the system they could use as their start-up page. Their options were: the Command Center Page, the Action Items Page, or the Create Reservation Page. Based on the way the system has been designed to process since that time, it does not seem to make sense to be able to choose anything other than the Action Items page as a user's start page. The profile build team suggests removing the option to allow a user to choose their start page from the user profile.

25

07-07-00 - Brad Reel: Feedback from the technical team and the business suggests that it may make more sense to have Create Reservation as an option, and have it process in a different manner than the normal create reservation process. The main advantage of this would be First Notice of Loss Adjusters. There was also consensus that if the ability to select your start page is removed in this release, it should be possible to easily add it back in the future.

30

07-07-00 - Brad Reel: Upon speaking to the database and build teams, it should not be difficult to add the functionality back to the system in a future release. A user's start page was set up as an attribute of a user, and since there will still be other attributes for a user, the start page will just be a new attribute when it is added back. Therefore adding the ability to choose a start page in a future release should not be difficult.

07-07-00 - Brad Reel: This issue is being assigned to Sean O'Donnell for review of the feasibility and impacts to the create reservation process if a user is allowed to enter the create res page without having entered the initial required fields (i.e. Claim #, Claim Type, Renter Last Name, etc.). This issue should be discussed for resolution at the 07-17 issues meeting and is being assigned to Craig Lalumandier as resolution contact until it is resolved. Upon resolution, this issue may need to be assigned back to Brad Reel so that the decision can be implemented into the user profile.

Status: Closed - Resolved

Resolution: 07/17/00 [Craig L.] - For the initial release, the start page will not be profiled. This feature would not be difficult to add in the future.

Sean O'Donnell 07-11-2000 - I would NOT recommend allowing users to have the create reservation page selected as their 'Start Page' for the following reasons:

- the reason(s) we split the reservation process into two pages to begin with still exist 1) to have the information to perform authorized and unauthorized matches to ensure that the reservation that is being created does not already exist, 2) to get the 'where needed' information to retrieve a location & rates, 3) to get the claim type information up front so that we can build the authorization section of the create reservation page appropriately.

- if we change the process to support 'FNOL' adjusters differently than the 'normal' way of creating a reservation, use of the application will be inconsistent.

Please contact me if there are concerns with these statements.